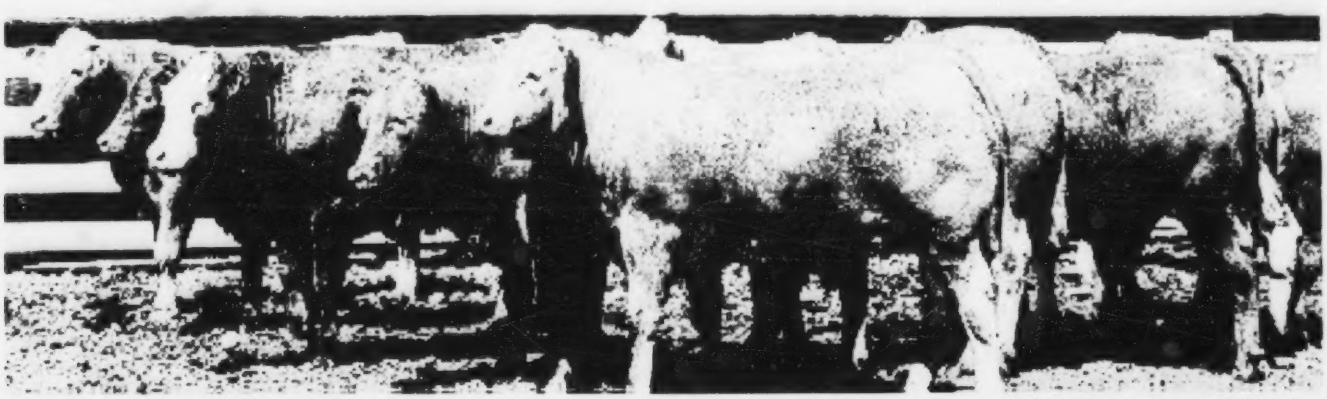
Manitoba
Agriculture
and Food

Program & Policy Analysis

2000

Manitoba Livestock Industry Profiles



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June, 2001

SOURCES AND DEFINITIONS

Sources:

Agriculture and Agri-Food Canada
Alberta Agriculture, Food and Rural Development
Ayerst Organics Ltd.
Canadian Co-operative Wool Growers Ltd.
Canadian Food Inspection Agency
CANFAX
Ian Thorleifson
Manitoba Agriculture and Food
Manitoba Auction Markets
Manitoba Milk Producers
Manitoba sheep and goat producers
Manitoba Industry, Trade and Mines
Statistics Canada
Winnipeg Livestock Sales

Definitions:

Marketings = Inspected slaughter of Manitoba-origin livestock in Manitoba + exports of livestock to other provinces and countries - imports of livestock from other provinces and countries + livestock custom-killed on Manitoba farms.

Production = Slaughter of Manitoba-origin livestock in Manitoba + exports of livestock to other provinces and countries - imports of livestock from other provinces and countries + livestock custom-killed on Manitoba farms +/- change in on-farm livestock inventory from January 1 - January 1.

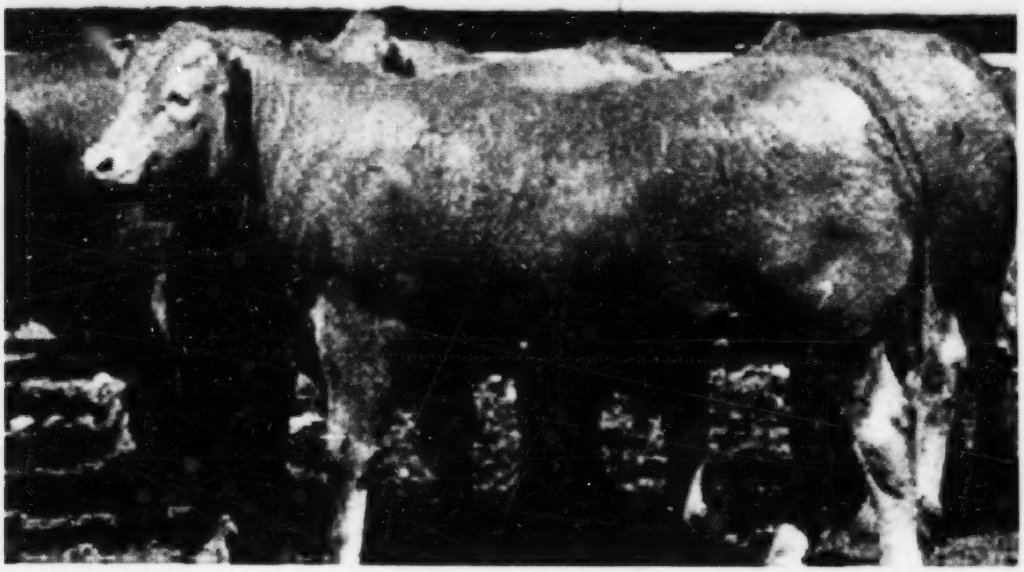
Farm Cash Receipts = Marketings in calendar year x average farm gate price (quoted commodity price less any levies as defined by Statistics Canada) + direct program payments.

Value of Production - Livestock production as defined above x average quoted commodity price (levies are not deducted as they are assumed to be an expense or a cost of doing business, such as broker's fees, auction market fees, cost of transportation to market, etc.).

Exports - The data may exclude Manitoba product marketed through companies in other provinces and subsequently exported or may include product from other provinces exported by Manitoba companies e.g. pork shipped from Manitoba plants to plants in Ontario and Quebec for further processing and export.

Imports - The data may exclude imported product sold in Manitoba by companies from other provinces e.g. New Zealand lamb imported by a national company with its head office in Calgary, but sold to Manitoba consumers, may be included with Alberta imports.

CATTLE AND BEEF SECTOR



CATTLE AND BEEF SECTOR PROFILE

Production:

Manitoba has Canada's third largest beef cow herd, after Alberta and Saskatchewan, with 12.4 percent of the nation's beef cows and more than 1.4 percent of total North American beef cows in 2000. Beef cow numbers in Manitoba increased fairly steadily at an average annual rate of about two percent from 1987 until 1992. Cow numbers then rose by an annual average rate of almost six percent to 1997. According to Statistics Canada, Manitoba's beef cow herd declined by one percent in both 1998 and 1999, but remained steady in 2000. In 2000, Manitoba's 10,295 beef cattle producers marketed almost 475,000 head for slaughter or sale out of the province. Marketings were down by 62,000 head from the 1999 level, mainly due to more animals being kept on farms for further feeding and sale in early 2001. The value of 535,000 cattle produced in 2000 (including an increase in inventory of 60,000 head) was close to $500 million, about one-sixth of the total value of agricultural production in the province. Over 97 percent of commercial beef cattle operations were cow-calf with many producers retaining and/or buying calves for further feeding to be sold as "stockers", "short-keeps" or for slaughter. The remaining 3 percent of commercial operations were feedlots, the largest of which had a capacity of 6,500 head. The beef cattle industry used about $136 million of feed in 2000.

Marketings:

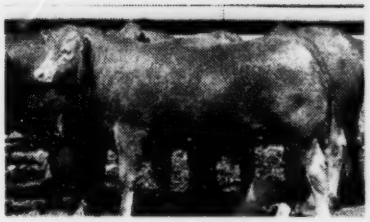
As Manitoba's cattle slaughter industry has declined from a peak of 581,000 head in 1976 to 17,300 head in 2000, most of the beef cattle produced in Manitoba are sold out of the province. In 2000, about 160,000 Manitoba slaughter cattle and 5,000 feeder cattle, valued at $185.6 million, were exported to the United States, while 29,000 slaughter cattle and an estimated 325,000 feeder cattle and calves were sold mainly to Alberta and Ontario. More than 10,000 slaughter cattle and almost 53,000 feeder cattle were brought into Manitoba from Saskatchewan in 2000.

Beef Processing and Trade:

Two small federally-inspected plants slaughtered about 7,150 cattle in 2000, while over 10,160 head were killed in 25 provincially-inspected plants in Manitoba. Beef production was estimated at 13.2 million lb. (carcass weight) valued at $22 million. Beef and beef products valued at $6.9 million were exported in 2000 with most of the exports going to the United States. Much of the beef consumed in Manitoba comes from Alberta or the United States. Beef valued at $9.6 million and hides valued at $19.6 million were imported from other countries in 2000.

Potential:

Manitoba has the potential to significantly increase the number of cattle fed to slaughter weight in the province. Less than one third of the calves produced are fed to slaughter weight, the remainder being sold as calves, as stockers or as heavy feeders.



CATTLE AND BEEF SECTOR

	1997	1998[R]	1999[R]	2000[P]	2000 as a % of 1999
NO. OF BEEF CATTLE FARMS:	11,760	11,290	10,920	10,295	94
(farms, 51+% of income from beef cattle):	6,870	6,815	7,255	7,500	103
BEEF CATTLE ON FARMS JULY 1 ('000):					
Bulls	27.9	24.1	25.2	25.8	102
Beef Cows	566.0	560.0	554.0	554.0	100
% of Canada	12.1	12.2	12.2	12.4	
Beef Replacement Heifers	93.0	85.0	81.0	82.0	101
Beef Slaughter Heifers	80.8	85.7	61.8	60.8	98
Steers	88.3	95.4	87.8	84.1	96
Calves under one year	495.2	500.6	497.8	501.3	101
Beef Cattle	1351.2	1,350.8	1,307.6	1,308.0	100
% of Canada	10.8	10.9	10.7	10.8	
CATTLE/CALF PRODUCTION ('000):	473	479	521	535	103
% of Canada	9.5	9.6	10.9	10.7	
AVERAGE CATTLE PRICES ($/cwt):					
Grade A Steers	82.70	82.63	86.78	95.28	110
D1,2 Cows	51.91	53.30	56.40	61.55	109
Feeder Steers (800-900lb.)	94.38	99.42	104.84	118.87	113
Steer Calves (500-600lb.)	106.40	116.84	126.48	147.74	117
VALUE OF CATTLE PROD ($ million):	370	415	444	500	113
CATTLE CASH RECEIPTS ($ million):	373.8	454.1	462.0	496.9	108
% of Canada	7.1	7.9	7.4	7.5	
CATTLE SLAUGHTER:					
Inspected slaughter in Manitoba	31,227	20,384	19,608	17,316	88
% of Canada	1.0	0.6	0.5	0.5	
Mb-origin Slaughter in Canada	55,029	39,550	39,700	39,100	98
% of Canada	1.7	1.1	1.0	1.0	
BEEF PRODUCTION (million lb. dress)	21.0	14.2	14.1	13.2	94
($ million estimate):	30	19	21	22	105
EXPORTS:					
Cattle ($ million)	220.6	236.2	173.5	185.6	107
Cattle ('000 head)	248.2	242.8	169.5	165.2	97
Beef/Beef Products ($ million)	4.3	5.2	6.5	6.9	106
Cattle Hides ($ million)	0.4	0.5	0.5	0.6	116
IMPORTS:					
Cattle ($ million)	0.3	0.6	0.8	2.9	363
Beef/Beef Products ($ million)	9.8	13.3	12.3	9.6	78
Cattle Hides ($ million)	26.4	16.7	17.0	19.6	115
CDN. PER CAPITA DISAPPEARANCE:					
Beef and veal (carcass weight (kg))	32.8	33.2	33.9	32.6	96

BEEF CATTLE INDUSTRY CHART, 2000

ANNUAL FEED REQUIRED:
$136 MILLION

10,950 PRODUCERS
3,000 PART/ FULL-TIME HIRED LABOUR
1,395,000 CATTLE ON FARMS JULY 1/00

OTHER ANNUAL CAPITAL & OPERATING EXPENDITURE:
$340 MILLION

IMPORTS OF BREEDING STOCK: N/A

DAIRY HERDS
PRODUCERS: 656
COWS: 47,000
HEIFERS: 16,500

INTERPROVINCIAL MOVEMENT OF BREEDING STOCK

BEEF HERDS
PRODUCERS: 10,295
COWS: 554,000
HEIFERS: 82,000

IMPORTS OF BREEDING STOCK N/A

EXPORTS OF BREEDING STOCK: N/A

EXPORTS OF BREEDING STOCK N/A

FEEDER CALVES

COMMERCIAL MARKETINGS OF SLAUGHTER OR FEEDER CATTLE

CATTLE SOLD TO MANITOBA PRODUCERS:
*106,000 HEAD [E]

FED/PROV. INSPECTED SLAUGHTER PLANTS:
17,300 HEAD
13.2 MILLION LB (DRESS.)
$22 MILLION VALUE

SLAUGHTER CATTLE:
IMPORTS: 0
INTERPROVINCIAL IN: 0

CATTLE SALES

	AUCTION	TERMINAL
FEEDER	* 436,500	
SLAUGHTER	106,000	100,000
TOTAL	* 542,500	100,000

FEEDER IMPORTS: 94
INTERPROVINCIAL IN:
FEEDER: 52,700
SLAUGHTER: 10,300

FRESH & PROCESS. BEEF
61 MILLION LB (RETAIL)

FRESH & PROC. BEEF IMPORTS: 5 MILLION LB
PROV. IN: 46 MILLION LB

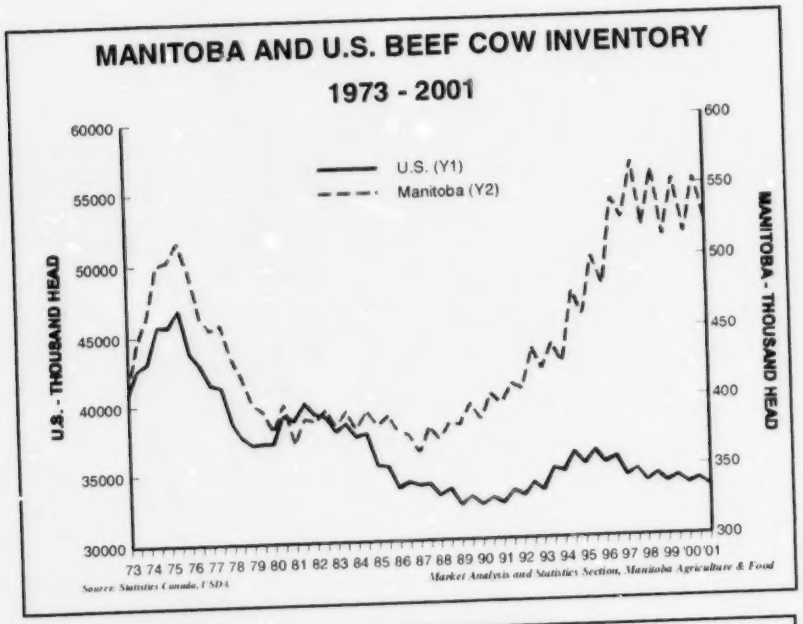
CATTLE FOR SLAUGHTER:
EXPORTS: 160,000
INTERPROVINCIAL OUT: 29,000

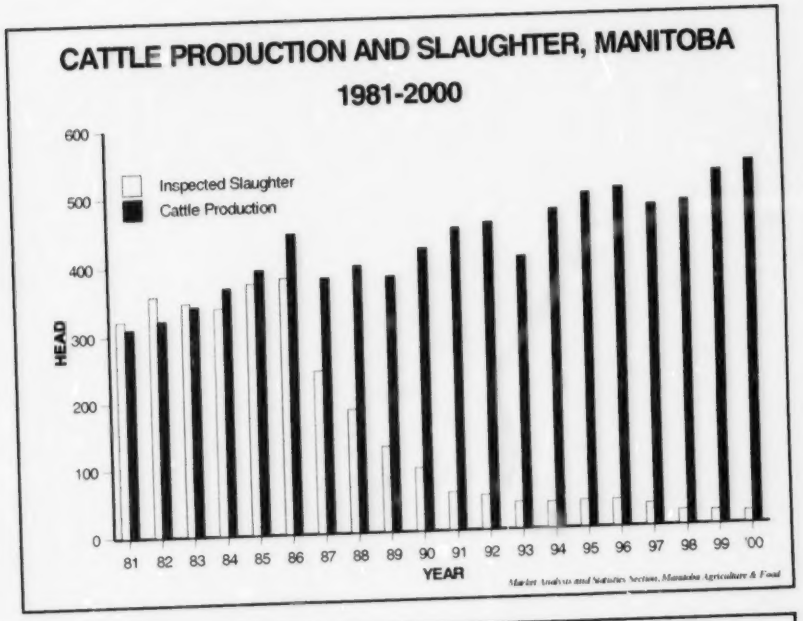
OTHER CATTLE:
EXPORTS: 5,000
INTERPROVINCIAL OUT:
WEST: 270,000[E]
EAST: 55,500

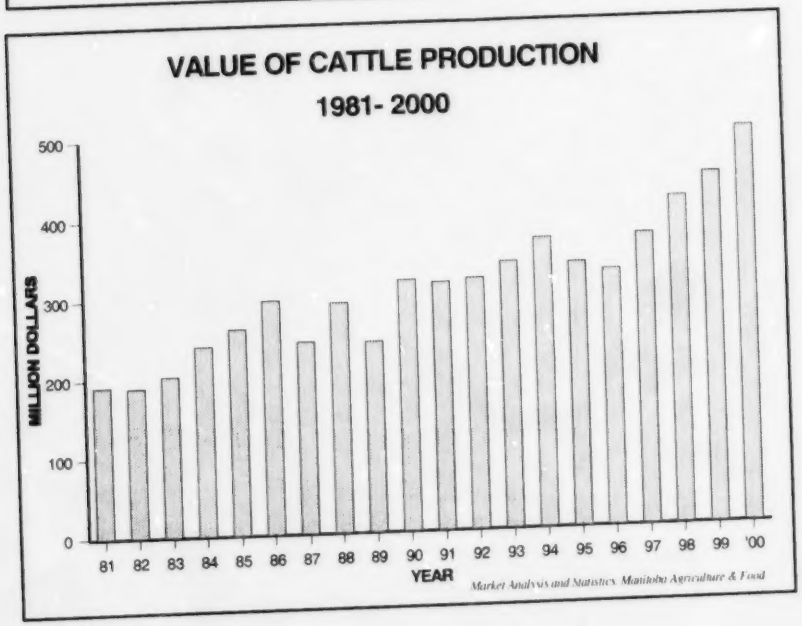
MANITOBA MARKET: FRESH & PROCESSED
58 MILLION LB

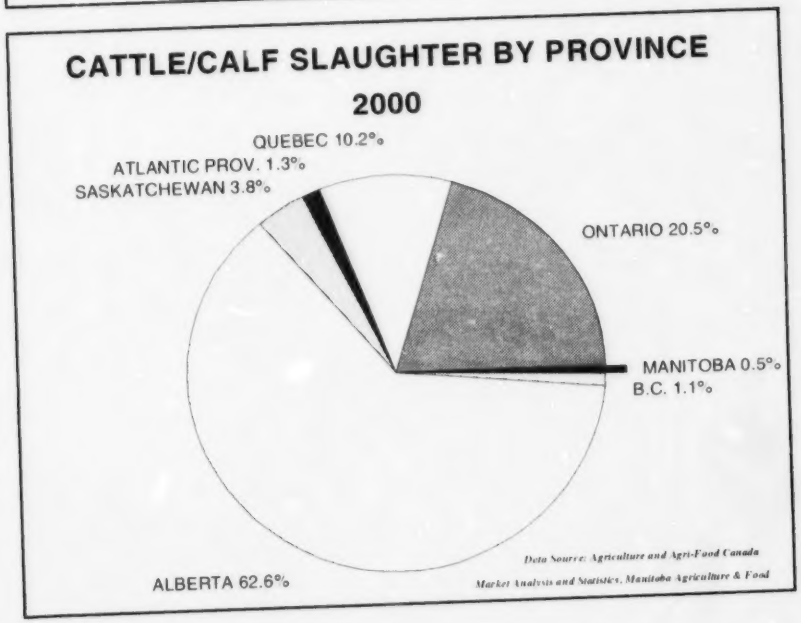
FRESH & PROCESSED BEEF EXPORTS : 3 MILLION LB

DATA SOURCE: Manitoba Agriculture & Food, Statistics Canada, Agriculture & Agri-Food Canada, Manitoba Auction Markets.
[E] Estimated * Some cattle may be sold more than once.

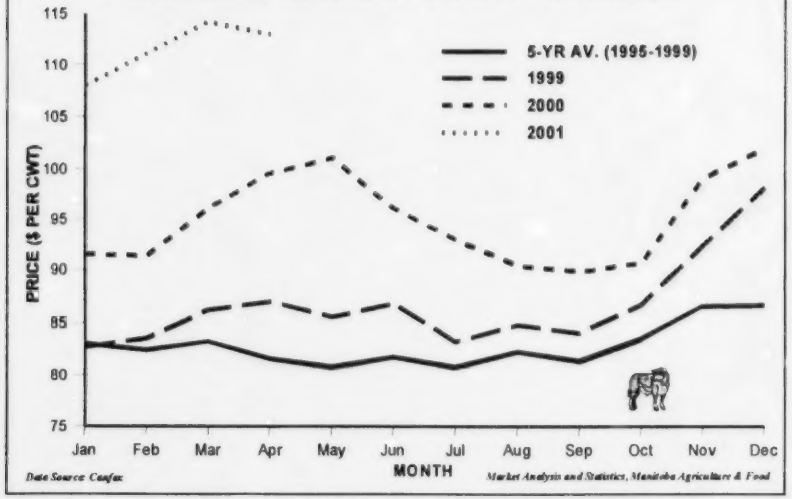

MANITOBA AND U.S. BEEF COW INVENTORY
1973 - 2001
U.S. (Y1)
Manitoba (Y2)
U.S. - THOUSAND HEAD
MANITOBA - THOUSAND HEAD
60000
55000
50000
45000
40000
35000
30000
600
550
500
450
400
350
300
73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 '00 '01
Source: Statistics Canada, USDA
Market Analysis and Statistics Section, Manitoba Agriculture & Food


CATTLE PRODUCTION AND SLAUGHTER, MANITOBA
1981-2000
Inspected Slaughter
Cattle Production
HEAD
600
500
400
300
200
100
0
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 '00
YEAR
Market Analysis and Statistics Section, Manitoba Agriculture & Food

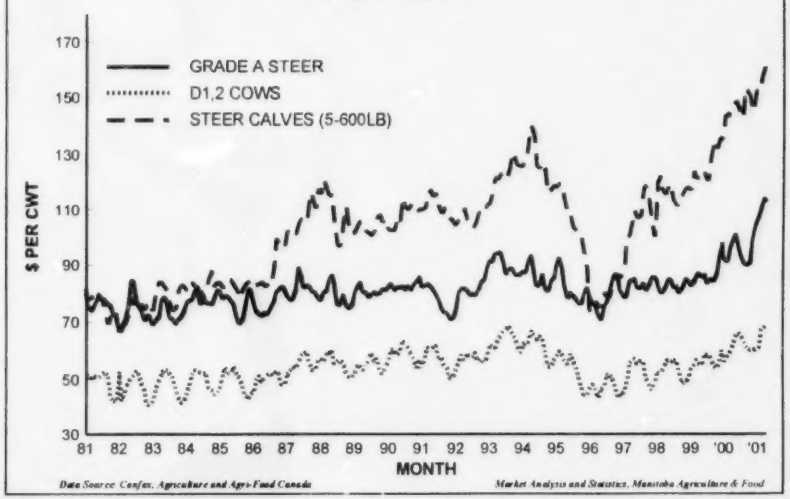

VALUE OF CATTLE PRODUCTION
1981- 2000
MILLION DOLLARS
500
400
300
200
100
0
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 '00
YEAR
Market Analysis and Statistics, Manitoba Agriculture & Food


CATTLE/CALF SLAUGHTER BY PROVINCE
2000
QUEBEC 10.2%
ATLANTIC PROV. 1.3%
SASKATCHEWAN 3.8%
ONTARIO 20.5%
MANITOBA 0.5%
B.C. 1.1%
ALBERTA 62.6%
Data Source: Agriculture and Agri-Food Canada
Market Analysis and Statistics, Manitoba Agriculture & Food

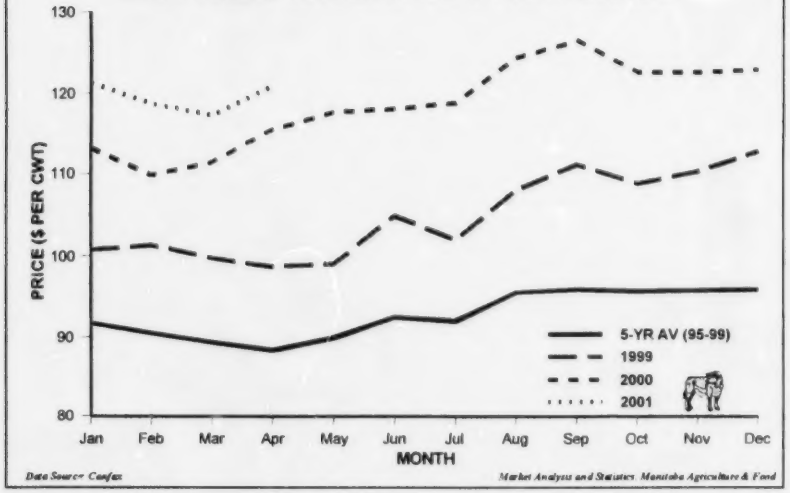
SEASONAL GRADE A STEER PRICES
MANITOBA, 1999-2001 VS 5-YR AVERAGE



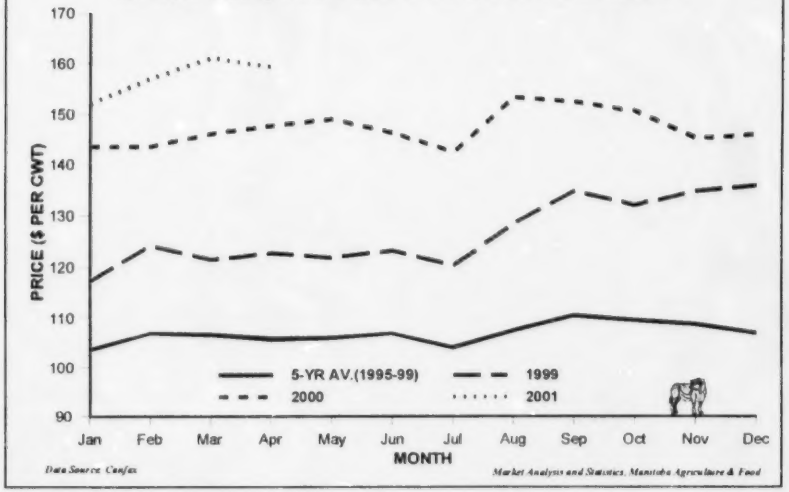
MANITOBA CATTLE PRICES BY MONTH
1981 - 2001



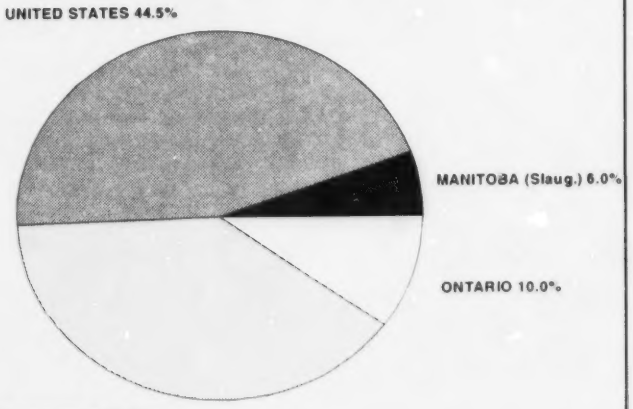
SEASONAL FEEDER STEER (8-900LB) PRICES
MANITOBA, 1999-2001 VS 5-YR AVERAGE



SEASONAL STEER CALF (5-600LB) PRICES
MANITOBA, 1999-2001 VS 5-YR AVERAGE



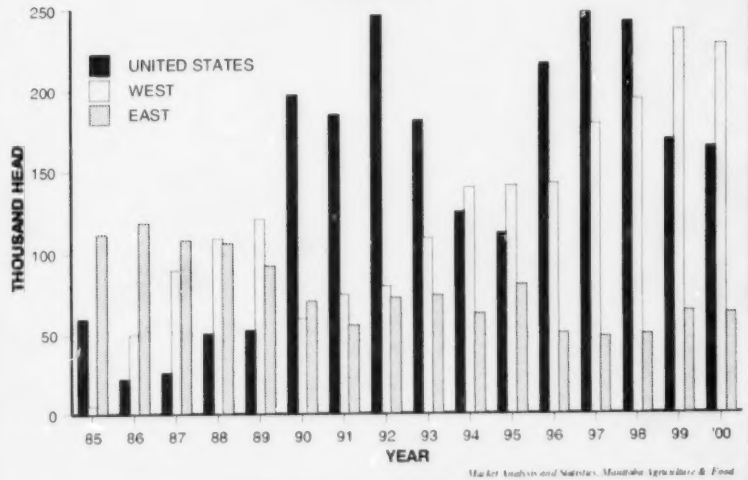
MANITOBA CATTLE*: DESTINATION AND PERCENTAGE OF CATTLE* MARKETINGS, 2000



* live weight

Market Analysis and Statistics, Manitoba Agriculture & Food

ESTIMATED MOVEMENT OF MANITOBA CATTLE 1985-2000



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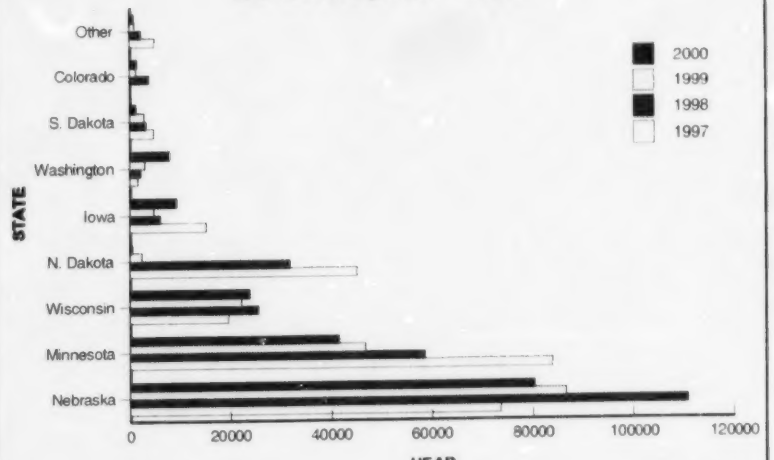
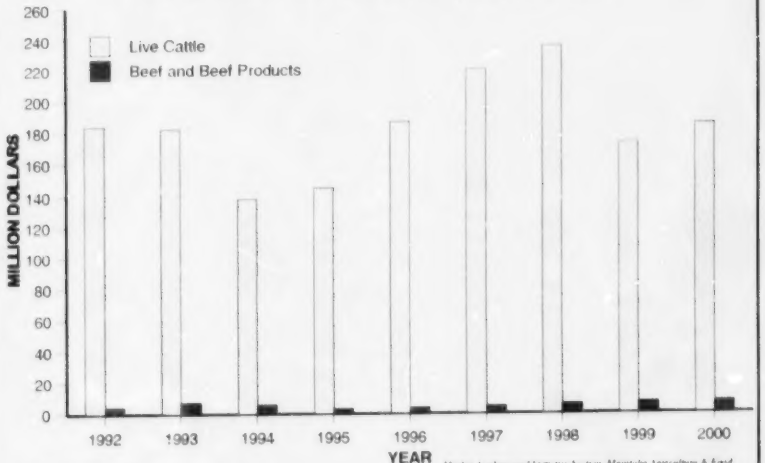
EXPORTS OF MANITOBA CATTLE TO USA BY STATE, 1997- 2000



Source: Statistics Canada, Agriculture and Agri-food Canada

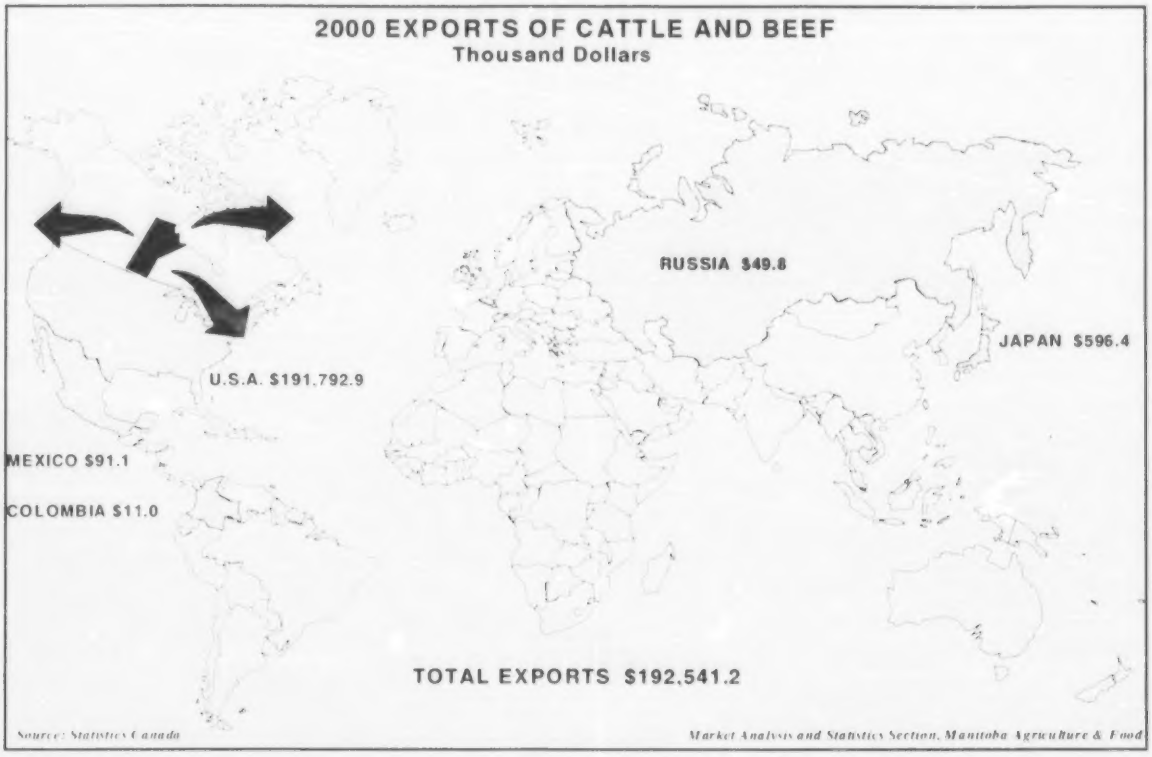
Market Analysis and Statistics Section, Manitoba Agriculture & Food

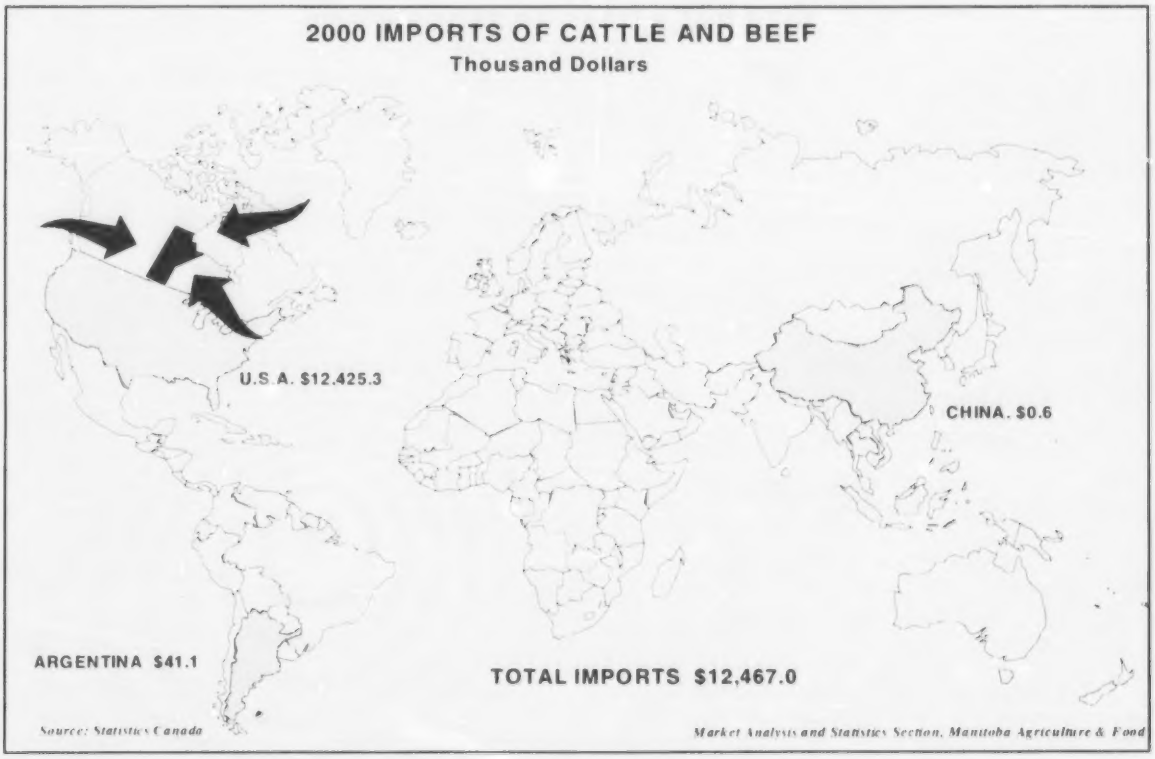
MANITOBA CATTLE & BEEF EXPORTS TO OTHER COUNTRIES, 1992-2000



Source: Statistics Canada

Market Analysis and Statistics Section, Manitoba Agriculture & Food


2000 EXPORTS OF CATTLE AND BEEF
Thousand Dollars
RUSSIA $49.8
JAPAN $596.4
U.S.A. $191,792.9
MEXICO $91.1
COLOMBIA $11.0
TOTAL EXPORTS $192,541.2
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture & Food


2000 IMPORTS OF CATTLE AND BEEF
Thousand Dollars
U.S.A. $12,425.3
CHINA. $0.6
ARGENTINA $41.1
TOTAL IMPORTS $12,467.0
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture & Food

HOG AND PORK SECTOR

HOG AND PORK SECTOR PROFILE

Production:

Manitoba had lost the advantage in cattle slaughter to Alberta in the 1970s. To take advantage of another industry that could utilize the feed grains produced in the province, provide processing and other value-added activities, such as construction and transportation, as well as new jobs, the province turned to hogs.

Manitoba is Canada's third largest hog-producing province, after Quebec and Ontario, with almost 23 percent of national production and four percent of total North American production in 2000. Hog production in the province has increased more than sixfold from 1975 to 2000, rising from 870,000 head in 1975 to 5.35 million head in 2000. In the past four years, the average annual rate of increase was 14 percent.

In 2000, Manitoba's 1,430 hog operations produced 5.35 million hogs (including an inventory increase of 49,200 head), an increase of 12.4 percent from 1999. Hog prices began to rise in early 2000 and, for the year, averaged 34 percent above the 1999 level. The value of hogs produced increased by 47 percent to almost $700 million in 2000. This was about 22 percent of the total value of agricultural production in the province. About 13 percent of commercial hog operations produce weanlings only, 40 percent are farrow to finish and 47 percent are feeder operations. The hog industry used $334 million of feed in 2000.

The quality of Manitoba hogs is one of the highest in Canada. The average hog Index in 2000 was close to 110 compared to 108.8 in 1998.

Hog Marketings:

Since July 1, 1996, hog producers have the option to market hogs to be slaughtered in the province either through brokers, such as Manitoba Pork Marketing Co-op, Inc., or directly to processing plants. Hog marketings totalled 5.30 million head in 2000, of which over 2.38 million head were sold out of the province. Over 0.90 million slaughter hogs and 1.44 million weanlings were exported directly to the U.S. by hog producers and brokers. Fewer than 0.05 million hogs were sold to Ontario and Quebec in 2000, triple the 1998 level, but well below the level in 1995 and 1996. Improved demand for hogs by expanding local pork processors led to 2.91 million Manitoba hogs being killed in Canadian plants in 2000, up by 13.4 percent from 1999.

Pork Processing:

The flexible marketing system for hogs, together with rapidly increasing hog production in the province, led to Maple Leaf Pork's new world-class, state-of-the-art $120 million hog slaughter plant being located in Brandon. The plant can kill more than two million hogs per year on a single shift with a potential capacity of five million hogs and employment of 1,150 people. Maple Leaf Pork began operation of the new plant on September 7, 1999, but, although the plant increased slaughter levels in 2000, it had not yet reached one-full shift capacity of 45,000 head per week by the end of the year. Expanded hog slaughter capacity at the J.M. Schneider plant in Winnipeg and Springhill Farms plant in Neepawa in 1999-2000 also contributed to a new record provincial slaughter level in 2000. The four major and two minor federally-inspected plants and 27 provincially-inspected plants in Manitoba killed over 3.92 million hogs in 2000, including 1.01 million head from Alberta, Saskatchewan, B.C. and Ontario. The number of hogs brought into the plants from other provinces was almost double the 1999 level. Although Manitoba hog operations produced enough hogs for all slaughter plants in the province, more than 40 percent of these hogs were shipped to the U.S. and other provinces in 2000.

The average carcass weight of Manitoba hogs continued to increase in 2000 to 89.6 kg (equivalent to about 112 kg or 250 lb of live hog). An estimated 351 million kg of pork (carcass weight) was produced in the province in 2000 with an estimated total wholesale value of close to $1.3 billion.

Trade:

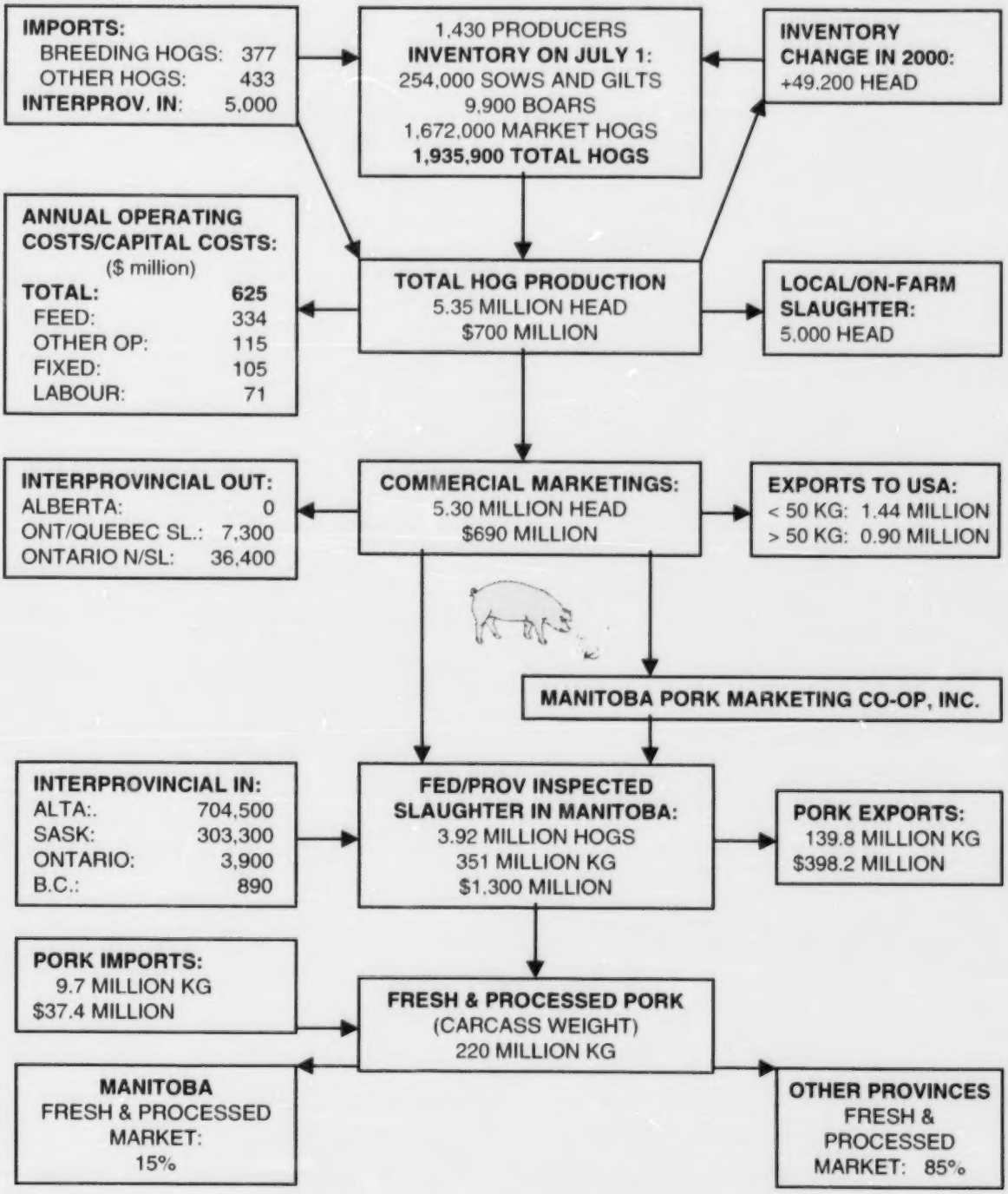
Manitoba is the largest hog-exporting province in Canada and the second largest pork-exporting province after Quebec. Almost $207.6 million of Manitoba hogs were shipped to 25 U.S. states and Mexico in 2000 compared to $165.3 million to 23 states a year earlier. The majority of slaughter hogs went to plants in South Dakota, Wisconsin, Iowa, North Dakota and Minnesota, while most weanlings were sold to feeder operations located in Iowa, Minnesota, Nebraska and South Dakota.

As Manitobans only consumed about nine percent of the total pork produced in the province and the equivalent of eight percent of all Manitoba hogs/pork marketed in 2000, most of the pork produced in Manitoba had to be sold to other provinces or countries. It appears that over half of the pork produced by Manitoba plants in 2000 was shipped to other provinces, such as Ontario. Almost 140 million kg of Manitoba pork and pork products, valued at a record $398 million, (not including pork shipped to plants in Ontario and Quebec and subsequently exported) were sold directly to 38 countries in 2000 with most exports going to the U.S. and Japan.

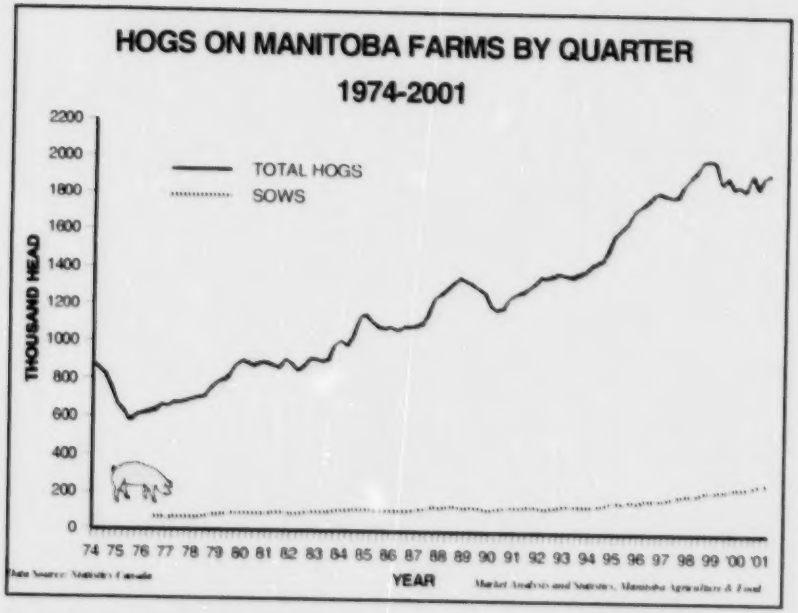
HOG AND PORK SECTOR

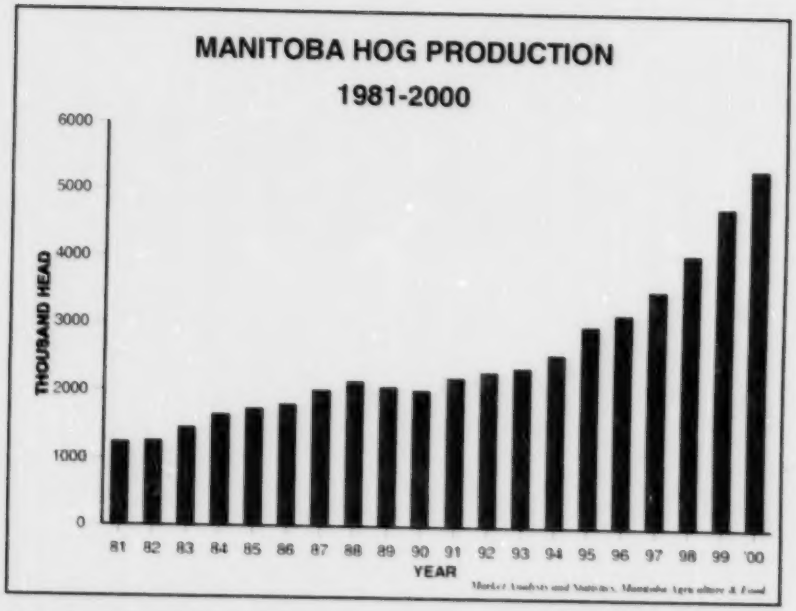
	1997	1998[R]	1999[R]	2000[P]	2000 as a % of '99
HOG FARMS (incl. non-commercial):	1,930	1,800	1,630	1,430	88
(farms, 51+% of income from hogs):	1,040	860	800	800	100
HOGS ON FARMS ('000):					
Sows & Bred Gilts	201.5	215.9	234.1	254.0	108
% of Canada	17.3	17.2	18.4	19.8	
Boars	10.1	10.3	10.3	9.9	96
Market Hogs	1,597.9	1,772.4	1,672.4	1,672.0	100
Total Hogs	1,809.5	1,998.6	1,916.8	1,935.9	101
% of Canada	15.5	16.1	15.5	15.7	
HOG PRODUCTION ('000):	3,530	4,060	4,760	5,350	112
% of Canada	18.5	18.9	20.8	23.0	
ANNUAL PRODTN. GROWTH RATE %:	11.6	14.7	17.0	12.4	
VALUE OF HOG PRODUCTION ($mln):	517	422	476	700	147
HOG CASH RECEIPTS ($ million):	468.6	396.4	482.3	672.6	139
% of Canada	15.7	17.8	19.8	19.9	
AV. INDEX 100 HOG PRICES ($/100kg):	182	121	125	167	134
AVERAGE INDEX:	108.5	108.8	109.8	110	100
HOG SLAUGHTER:					
Inspected Slaughter in Manitoba('000)	2,075.8	2,820.0	3,073.0	3,923.9	128
% of Canada	13.7	17.2	16.4	20.6	
Mb-origin Slaughter in Canada ('000)	2,071.9	2,260.0	2,566.3	2,910.0	113
% of Canada	13.7	13.5	13.7	15.3	
PORK PRODUCTION: ('000 tonnes dr.)	175	245	275	351	128
($ million est.)	500	560	935	1,300	139
EXPORTS:					
Hogs - ('000)	1,347.1	1,660.3	2,284.5	2,342.3	103
- ($ million)	164.0	155.8	165.3	207.6	126
Pork - (million kg)	46.3	73.2	88.1	139.8	159
- ($ million)	154.4	197.3	239.9	398.2	166
IMPORTS:					
Hogs (breeding) - ($ million)	0.4	0.4	0.3	0.3	100
Pork and products - ($ million)	17.6	20.7	29.2	37.4	128
CDN. PER CAPITA DISAPPEARANCE:					
Pork (carcass wt. kg)	25.4	27.1	28.2	28.6	101

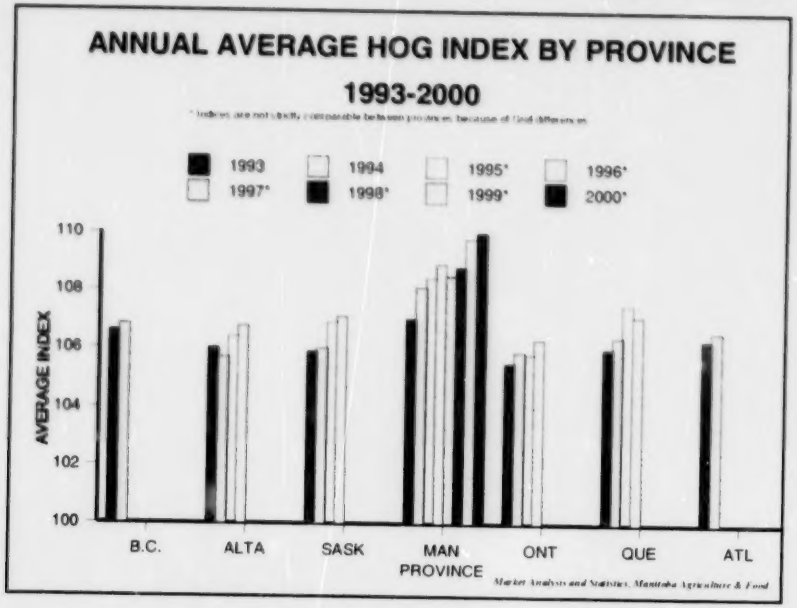
HOG INDUSTRY CHART, 2000

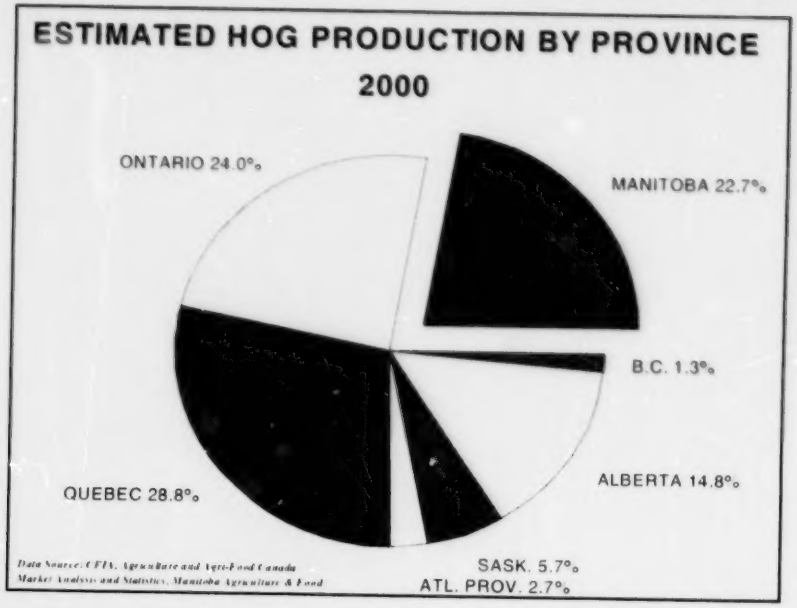


DATA SOURCE: Manitoba Agriculture and Food, CFIA, Statistics Canada, Agriculture & Agri-Food Canada

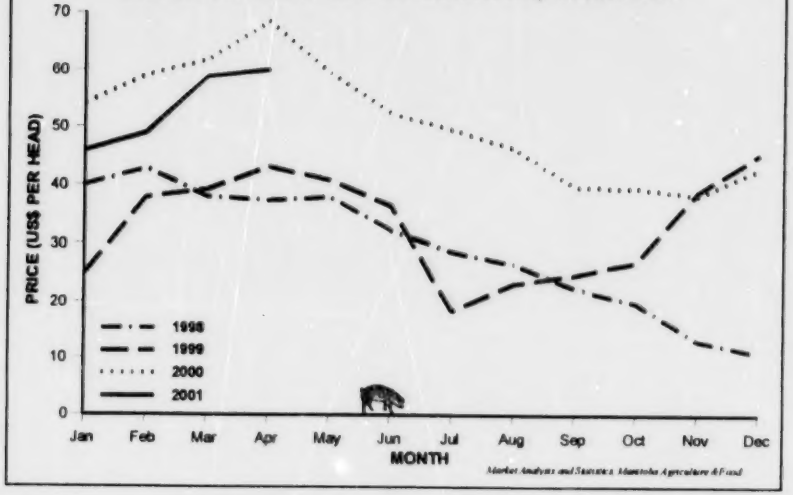

HOGS ON MANITOBA FARMS BY QUARTER
1974-2001
TOTAL HOGS
SOWS
THOUSAND HEAD
2200
2000
1800
1600
1400
1200
1000
800
600
400
200
0
74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 '00 '01
YEAR
Market Analysis and Statistics, Manitoba Agriculture & Food


MANITOBA HOG PRODUCTION
1981-2000
THOUSAND HEAD
6000
5000
4000
3000
2000
1000
0
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 '00
YEAR

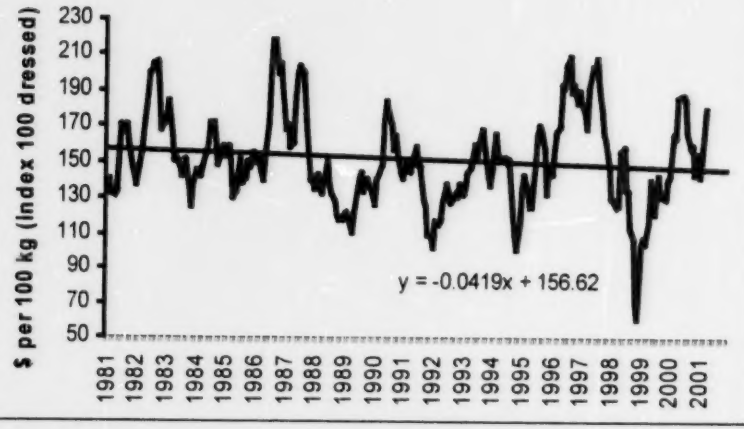

ANNUAL AVERAGE HOG INDEX BY PROVINCE
1993-2000
1993
1994
1995*
1996*
1997*
1998*
1999*
2000*
AVERAGE INDEX
110
108
106
104
102
100
B.C.
ALTA
SASK
MAN
ONT
QUE
ATL
PROVINCE
Market Analysis and Statistics, Manitoba Agriculture & Food


ESTIMATED HOG PRODUCTION BY PROVINCE
2000
ONTARIO 24.0%
MANITOBA 22.7%
B.C. 1.3%
ALBERTA 14.8%
SASK. 5.7%
ATL. PROV. 2.7%
QUEBEC 28.8%
Data Source: CFIA, Agriculture and Agri-Food Canada
Market Analysis and Statistics, Manitoba Agriculture & Food

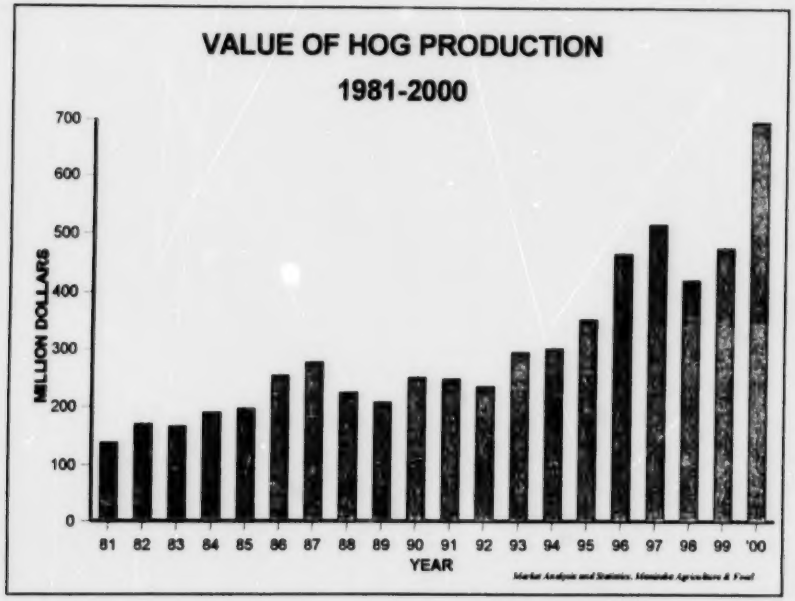
SEASONAL WEANLING (50-60LB) PRICES SIOUX FALLS, SOUTH DAKOTA, 1998-2001



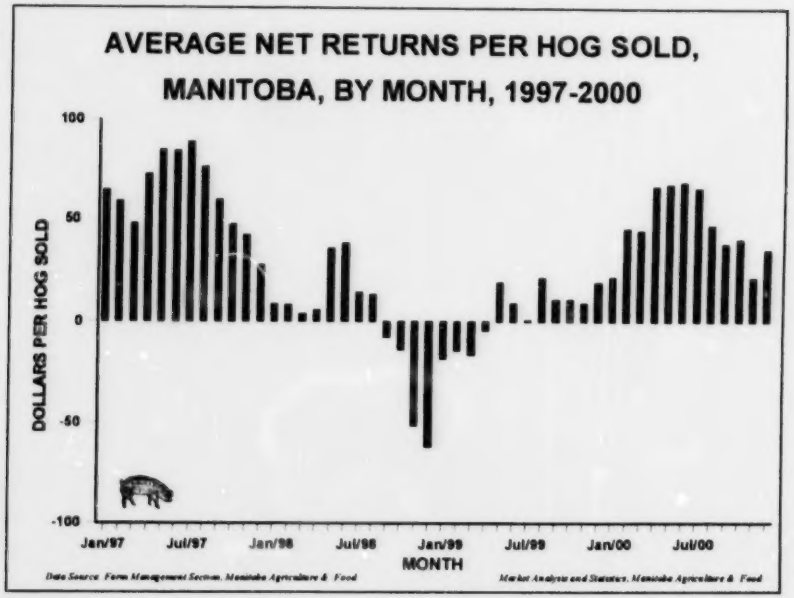
MANITOBA INDEX 100 HOG PRICES, BY MONTH, 1981-2001

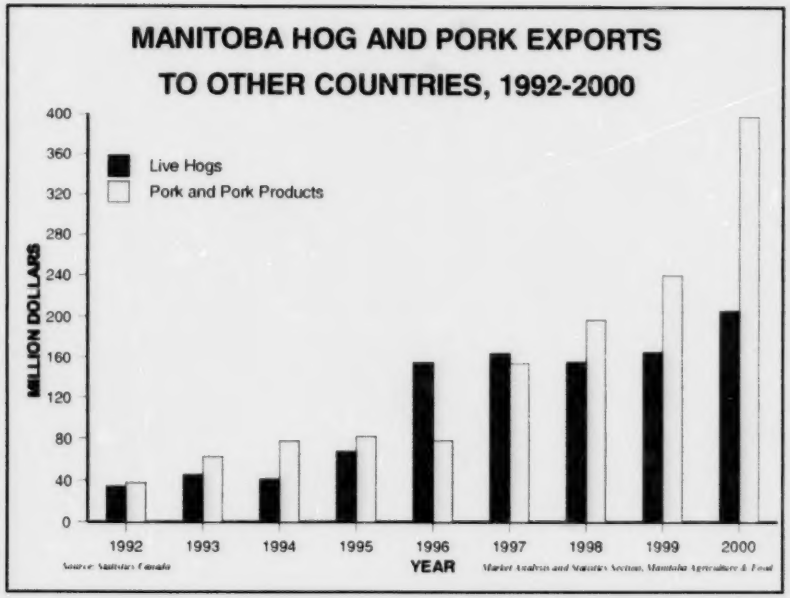


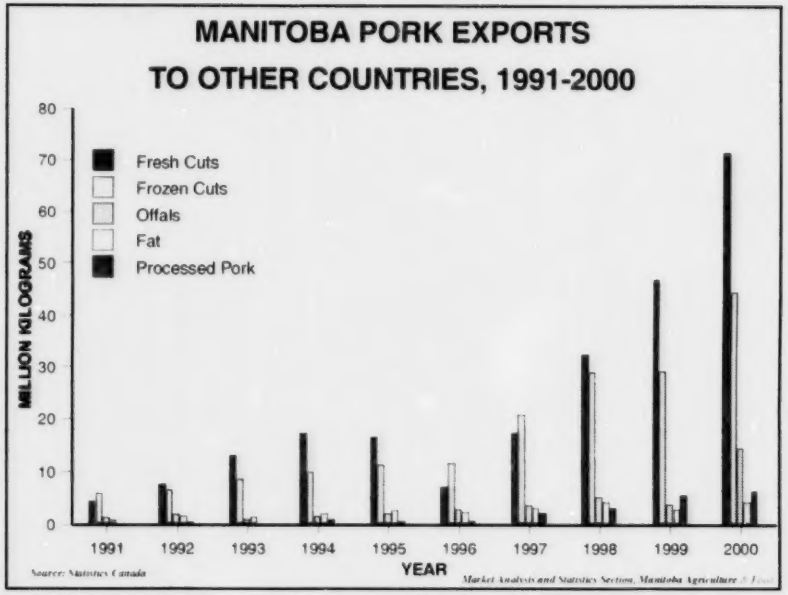
VALUE OF HOG PRODUCTION 1981-2000

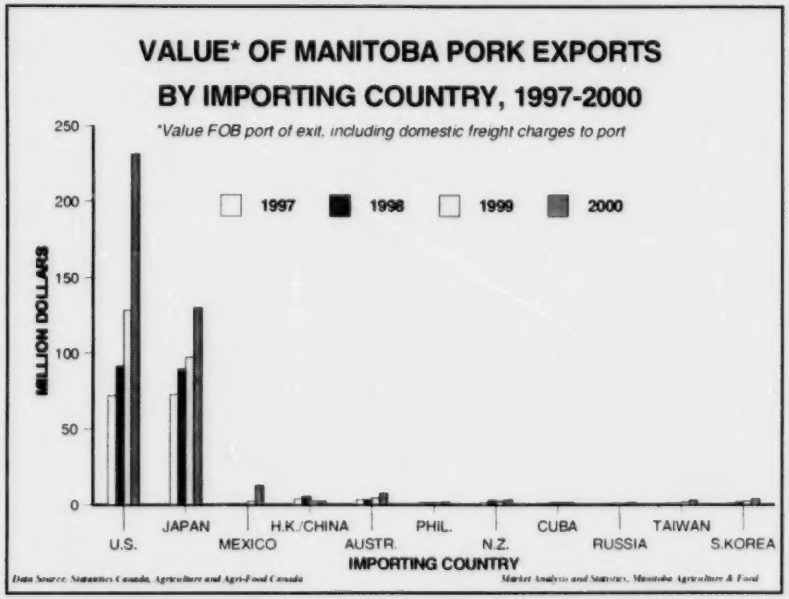


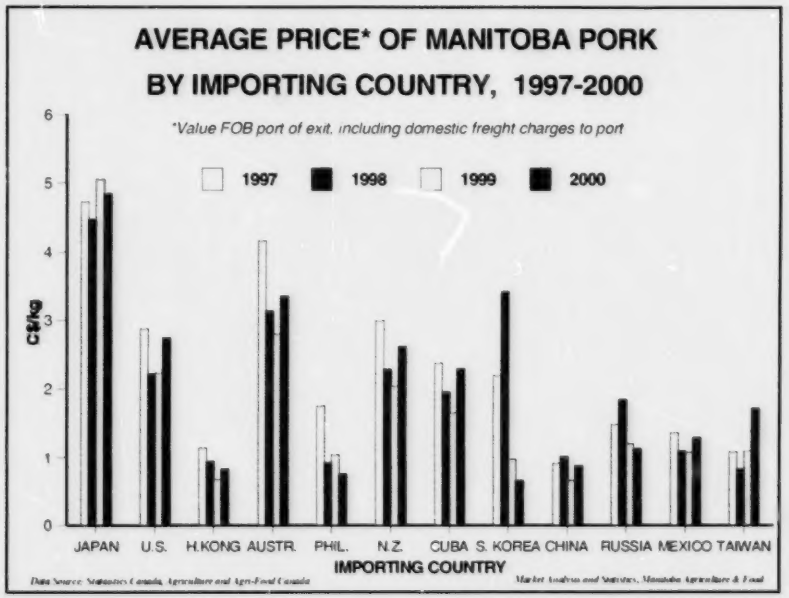
AVERAGE NET RETURNS PER HOG SOLD, MANITOBA, BY MONTH, 1997-2000



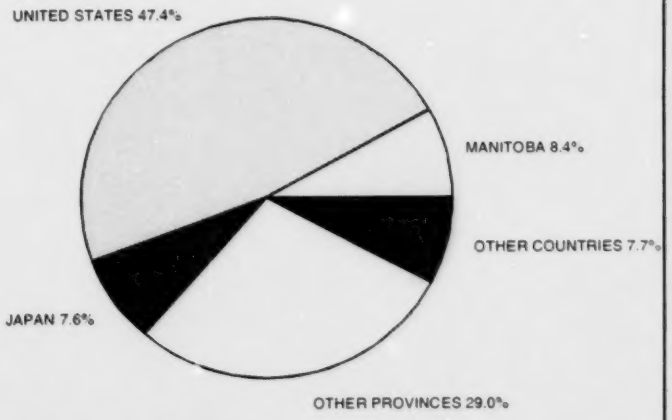

MANITOBA HOG AND PORK EXPORTS
TO OTHER COUNTRIES, 1992-2000
Live Hogs
Pork and Pork Products
MILLION DOLLARS
400
360
320
280
240
200
160
120
80
40
0
1992
1993
1994
1995
1996
1997
1998
1999
2000
YEAR
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture & Food


MANITOBA PORK EXPORTS
TO OTHER COUNTRIES, 1991-2000
Fresh Cuts
Frozen Cuts
Offals
Fat
Processed Pork
MILLION KILOGRAMS
80
70
60
50
40
30
20
10
0
1991
1992
1993
1994
1995
1996
1997
1998
1999
2000
YEAR
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture


VALUE* OF MANITOBA PORK EXPORTS
BY IMPORTING COUNTRY, 1997-2000
*Value FOB port of exit, including domestic freight charges to port
1997
1998
1999
2000
MILLION DOLLARS
250
200
150
100
50
0
U.S.
JAPAN
MEXICO
H.K./CHINA
AUSTR.
PHIL.
N.Z.
CUBA
RUSSIA
TAIWAN
S.KOREA
IMPORTING COUNTRY
Data Source: Statistics Canada, Agriculture and Agri-Food Canada
Market Analysis and Statistics, Manitoba Agriculture & Food


AVERAGE PRICE* OF MANITOBA PORK
BY IMPORTING COUNTRY, 1997-2000
*Value FOB port of exit, including domestic freight charges to port
1997
1998
1999
2000
C$/kg
6
5
4
3
2
1
0
JAPAN
U.S.
H.KONG
AUSTR.
PHIL.
N.Z.
CUBA
S. KOREA
CHINA
RUSSIA
MEXICO
TAIWAN
IMPORTING COUNTRY
Data Source: Statistics Canada, Agriculture and Agri-Food Canada
Market Analysis and Statistics, Manitoba Agriculture & Food

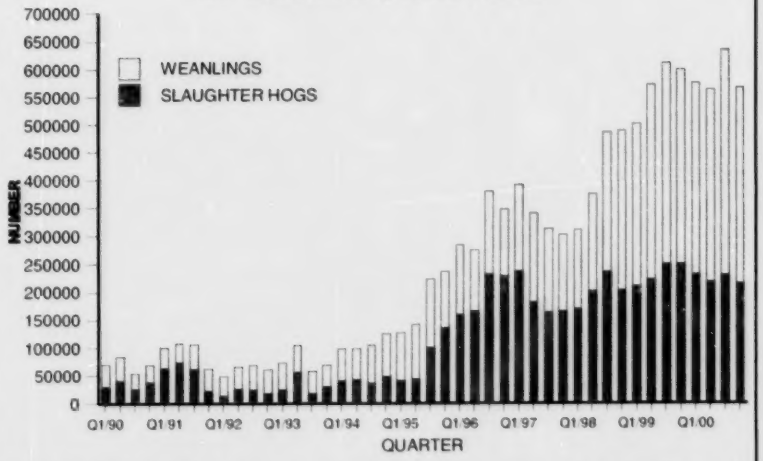
MANITOBA HOGS*/PORK: DESTINATION AND PERCENTAGE OF HOG* MARKETINGS, 2000



* Converted to carcass equivalent

Market Analysis and Statistics, Manitoba Agriculture & Food

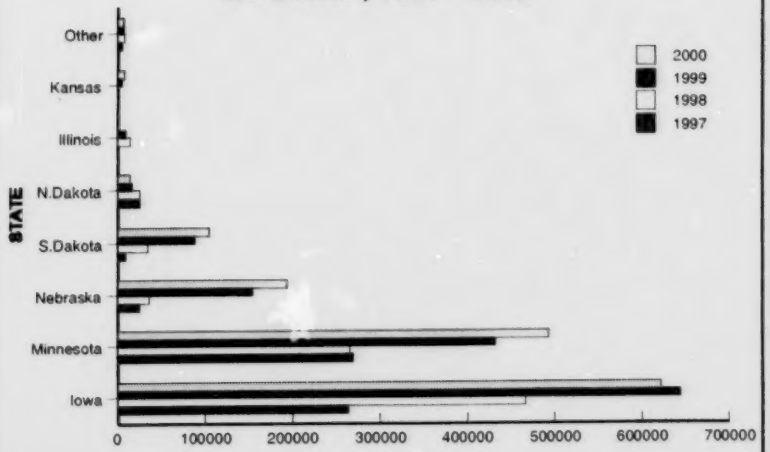
MANITOBA HOG EXPORTS TO USA BY QUARTER, 1990 - 2000



Data Source: Manitoba Pork, Est. Statistics Canada

Market Analysis and Statistics Section, Manitoba Agriculture & Food

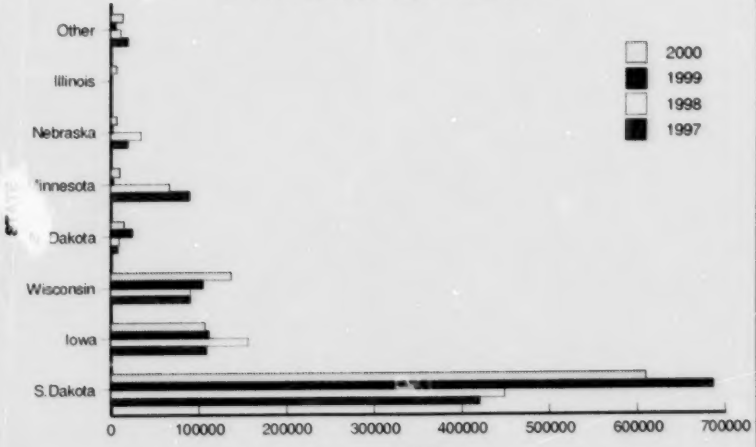
EXPORTS OF MANITOBA HOGS (< 50 KG) TO USA BY STATE, 1997 - 2000



Source: Statistics Canada, Agriculture and Agri-food Canada

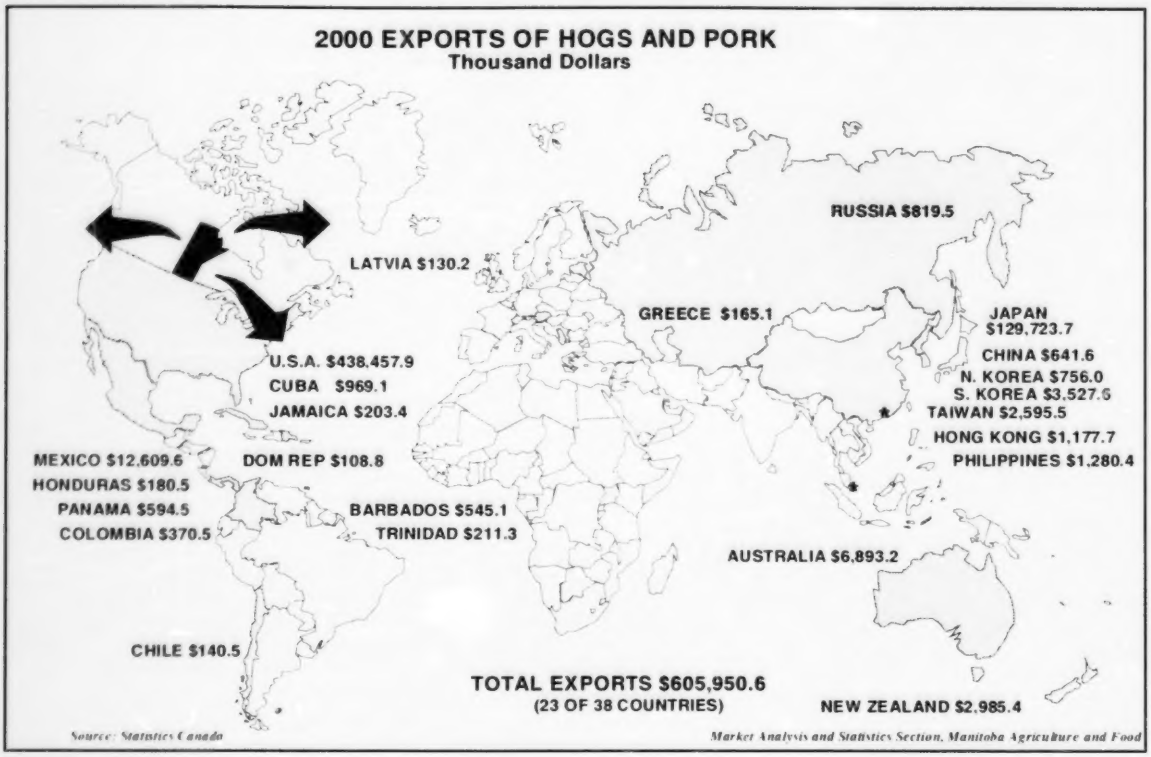
Market Analysis and Statistics Section, Manitoba Agriculture & Food

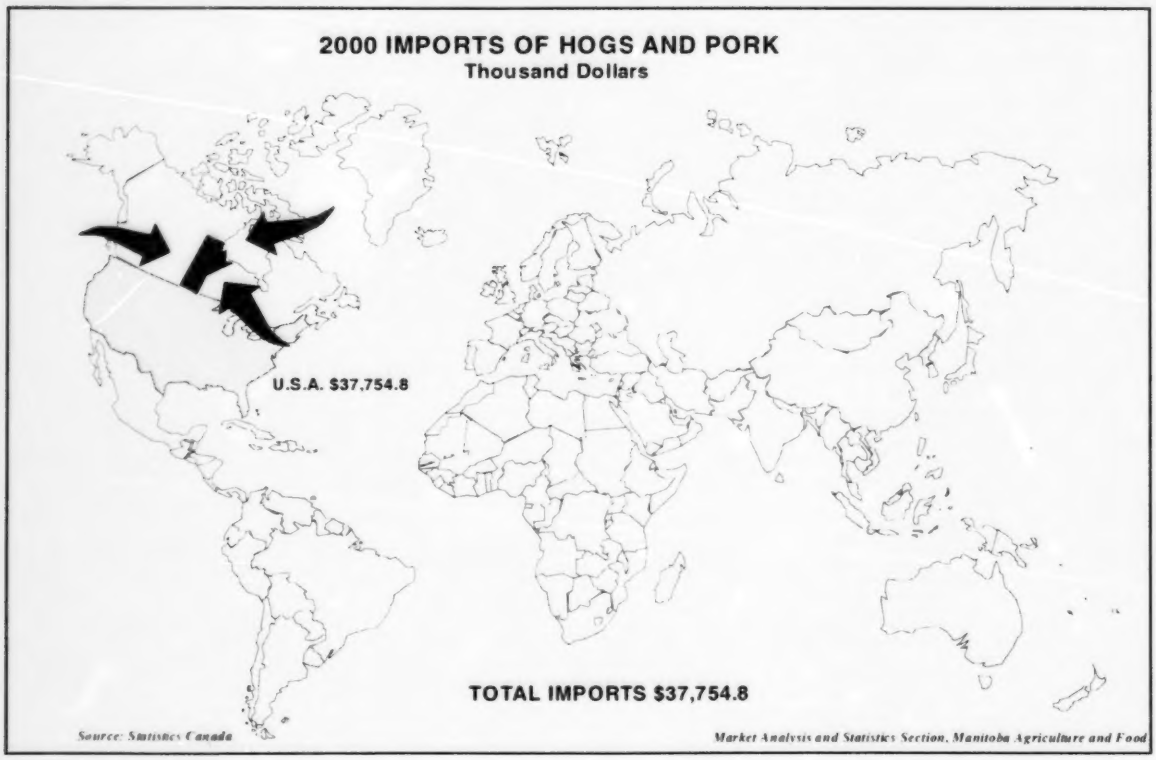
EXPORTS OF MANITOBA HOGS (> 50 KG) TO USA BY STATE, 1997 - 2000



Source: Statistics Canada, Agriculture and Agri-food Canada

Market Analysis and Statistics Section, Manitoba Agriculture & Food


2000 EXPORTS OF HOGS AND PORK
Thousand Dollars
RUSSIA $819.5
LATVIA $130.2
GREECE $165.1
JAPAN $129,723.7
CHINA $641.6
N. KOREA $756.0
S. KOREA $3,527.6
TAIWAN $2,595.5
HONG KONG $1,177.7
PHILIPPINES $1,280.4
U.S.A. $438,457.9
CUBA $969.1
JAMAICA $203.4
MEXICO $12,609.6
DOM REP $108.8
HONDURAS $180.5
PANAMA $594.5
COLOMBIA $370.5
BARBADOS $545.1
TRINIDAD $211.3
AUSTRALIA $6,893.2
CHILE $140.5
TOTAL EXPORTS $605,950.6
(23 OF 38 COUNTRIES)
NEW ZEALAND $2,985.4
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food


2000 IMPORTS OF HOGS AND PORK
Thousand Dollars
U.S.A. $37,754.8
TOTAL IMPORTS $37,754.8
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture and Food

SHEEP AND LAMB SECTOR

SHEEP AND LAMB SECTOR PROFILE

Production:

Although much smaller than the cattle and hog industries, Manitoba's sheep and lamb industry is the fifth largest in Canada, with 6.3 percent of the ewes, and 0.9 percent of total North American production in 2000. Lamb production in Manitoba has been increasing fairly steadily since 1987 and is likely to expand further during the current period of profitable prices. In 2000, Manitoba's 600 operators produced an estimated 48,000 lambs, an increase of 28 percent from the 1999 level. The value of Manitoba lambs produced in 2000 was about $4.7 million, almost 0.15 percent of the total value of agricultural production in the province. Manitoba farm cash receipts from sheep and lambs sold in 2000, including the value added to imported lambs, was $9.54 million, up by 5.6 percent from 1999.

Marketings and Trade:

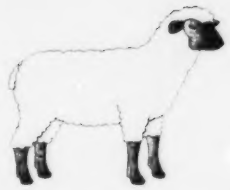
The Manitoba lamb/sheep feedlot industry is actually much larger than lamb production in the province. In 2000, about 61,000 sheep and lambs were brought into Manitoba from British Columbia, Saskatchewan, Alberta and the U.S. Many of these animals were fed for various lengths of time in the province before being shipped to Ontario, Quebec or the United States for sale and slaughter. About 56,000 sheep and lambs were sold in Ontario and Quebec and approximately 2,000 head went to Saskatchewan and Alberta. In 2000, 27,240 sheep and lambs were exported to the United States. Grunthal Livestock Auction Market began reporting the selling price of sheep and lambs in February 2000. This has contributed to a rise in local prices for sheep and lambs.

Lamb Slaughter:

Provincially-inspected plants in Manitoba slaughtered over 2,187 lambs in 2000, either for sale to local retailers or on a custom-kill basis. About 8,000 lambs were killed on farm for/by customers in 2000. Most of the lamb consumed in Manitoba comes from New Zealand or Alberta. The Canadian per capita disappearance of lamb and mutton was about 0.9kg (carcass weight) in 2000, 13 per cent higher than in 1999.

Potential:

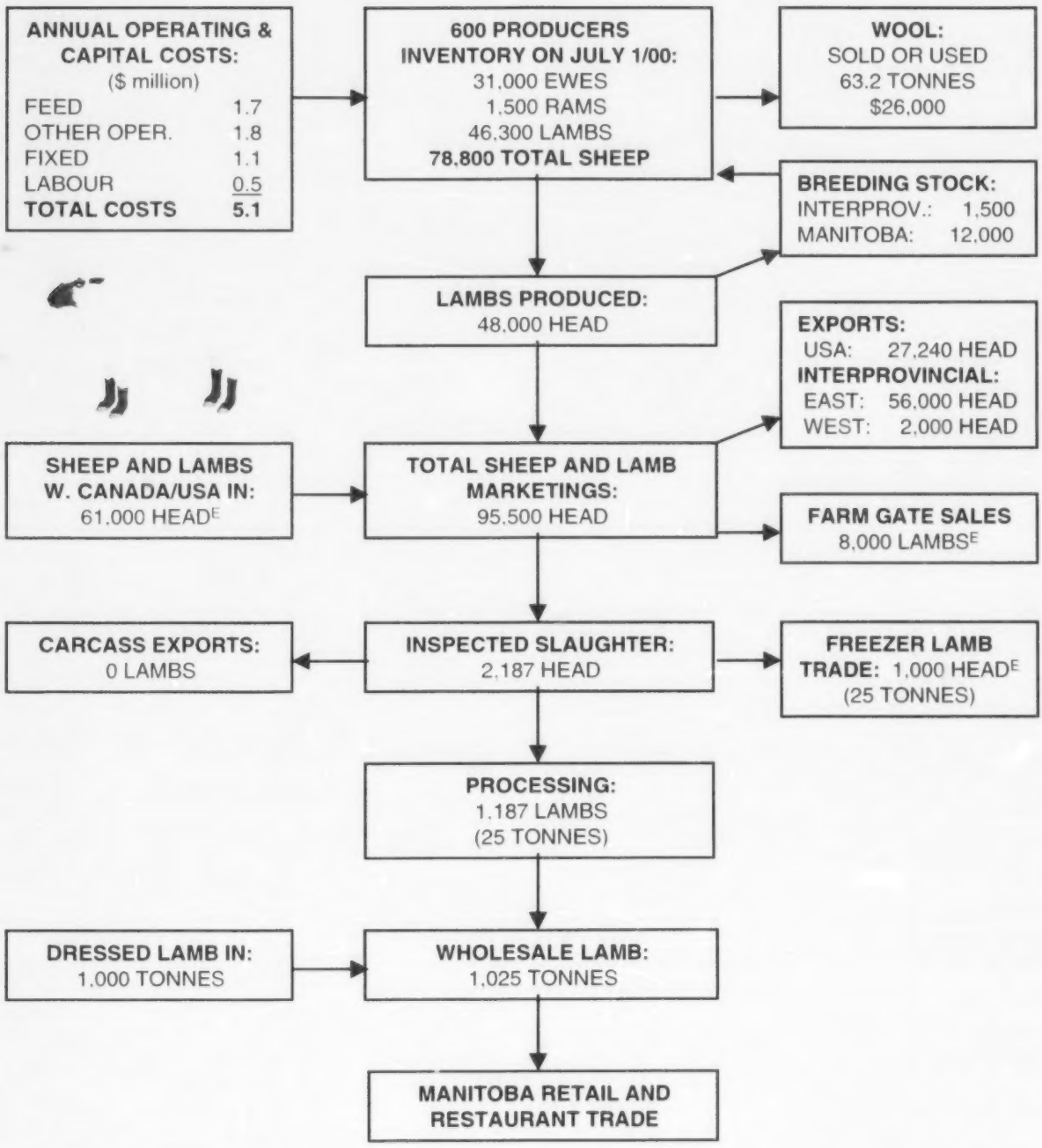
The Manitoba Sheep Association and their strategic partners are currently involved with the Manitoba Sheep Initiative, funded by the Manitoba Rural Adaptation Council (MRAC), which will identify opportunities for industry development and promote the value of sheep production as a value added marketing option for forages. Since July 1999, industry stakeholders have been surveyed to determine their interest and involvement in the industry, sheep producers have been asked to provide costs of production data, a comparative advantage study of the industry has been commissioned, and production workshops and information resource development have begun. A workshop to develop a strategic plan for the industry is planned for the fall 2001.



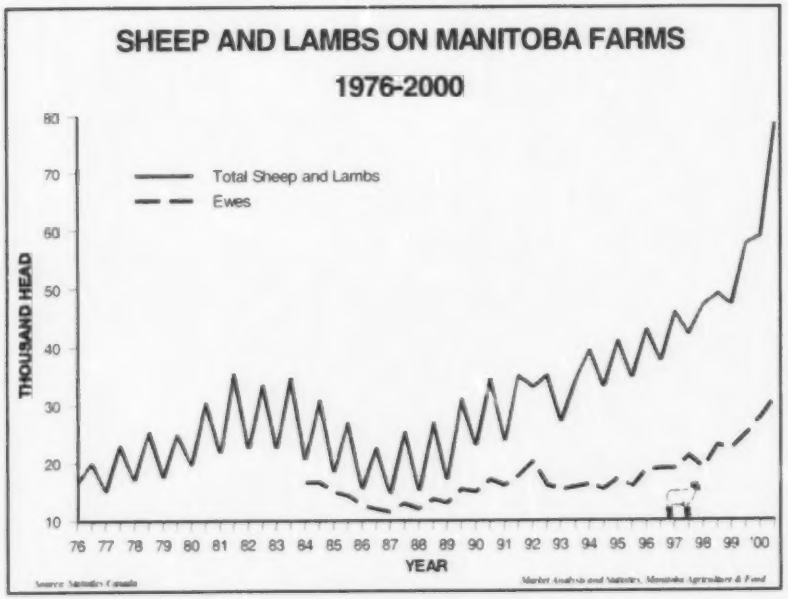
SHEEP, LAMB, WOOL SECTOR

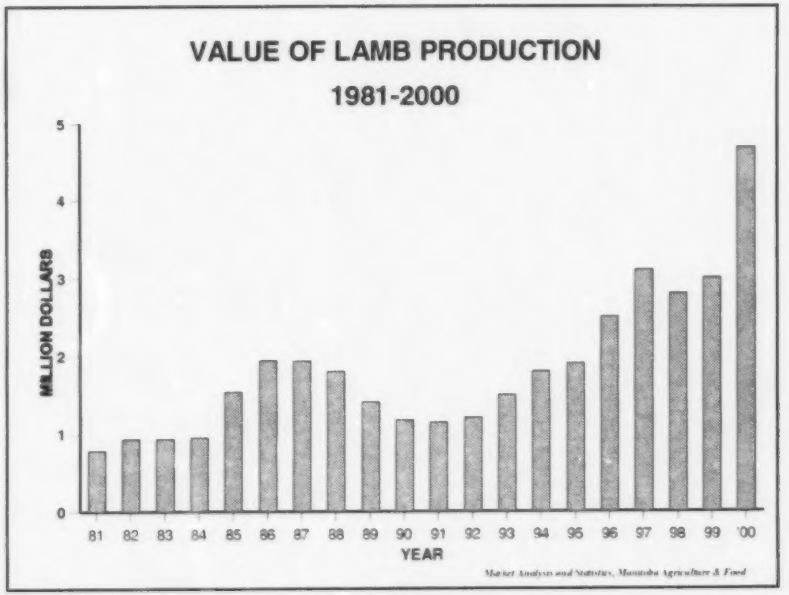
	1997	1998[R]	1999[R]	2000[P]	2000 as a % of '99
NO. OF SHEEP FARMS:	555	565	555	600	108
SHEEP ON FARMS JULY 1 ('000):					
Ewes	21.2	23.0	25.0	31.0	124
% of Canada	5.0	5.5	5.6	6.3	
Rams	1.0	1.0	1.0	1.5	150
Lambs for Breeding	4.6	6.0	6.5	7.0	108
Lambs for Market	15.3	19.0	25.0	39.3	157
Total Sheep	42.1	49.0	57.5	78.8	137
% of Canada	5.1	5.9	6.5	8.1	
LAMB PRODUCTION ('000):	32	34.5	37.5	48.0	128
VALUE OF LAMB PRODUCTN ($'000):	3,100	2,800	3,000	4,700	157
CASH RECEIPTS ($'000):					
Sheep/Lambs	12,320	10,350	9,030	9,540	106
% of Canada	16.3	15.1	12.6	12.1	
Wool Sold	97	60	29	26	90
AV. SHEEP/LAMB PRICES ($/cwt):					
Sheep	43	45	48	51	106
Lambs A & B (under 80lb.)	120	103	109	109	100
Lambs A & B (80-94lb.)	109	92	92	112	122
SHEEP/LAMB SLAUGHTER:					
Inspected in Manitoba (head)	1,416	1,552	2,112	2,187	104
% of Canada	0.5	0.5	0.6	0.6	
LAMB/MUTTON PROD (tonnes dress):	32.0	35.0	48.0	50.0	104
WOOL SOLD OR USED ON FARMS:					
Weight (tonnes)	82.7	64.5	65.6	63.2	96
Value ($'000)	100	63	29	26	90
AVERAGE PRICE OF WOOL ($/kg):	1.21	0.97	0.44	0.41	93
EXPORTS OF SHEEP/LAMBS:					
To U.S.A.	34,600	37,600	37,700	27,240	73
To Eastern Canada	44,000	42,300	46,000	56,000	122
To Western Canada	4,000	4,500	4,000	2,000	50
IMPORTS:					
Sheep/Lambs from W. Canada/U.S.	70,000	67,000	68,000	61,000	90
Lamb/Mutton (tonnes)	600	700	690	1,000	145
CDN PER CAPITA DISAPPEARANCE:					
Lamb and Mutton (carcass weight (kg))	0.7	0.8	0.8	0.9	113

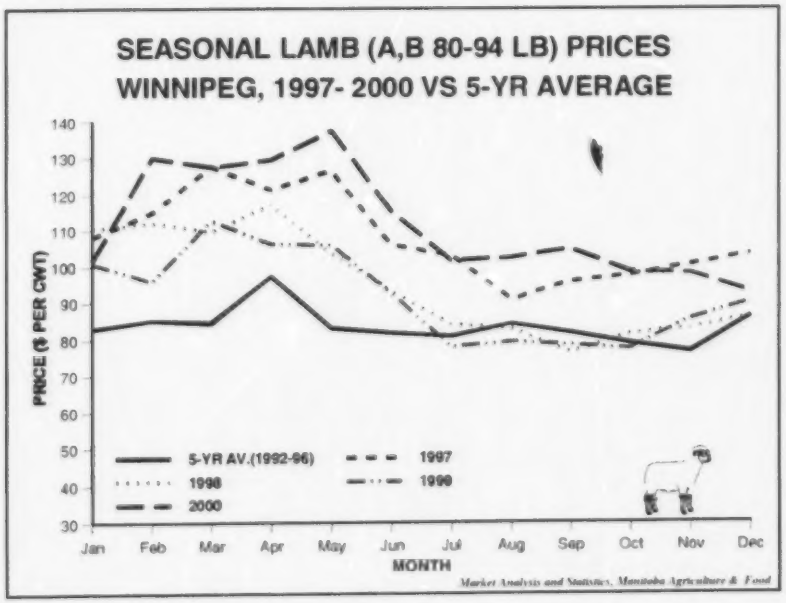
SHEEP INDUSTRY CHART, 2000

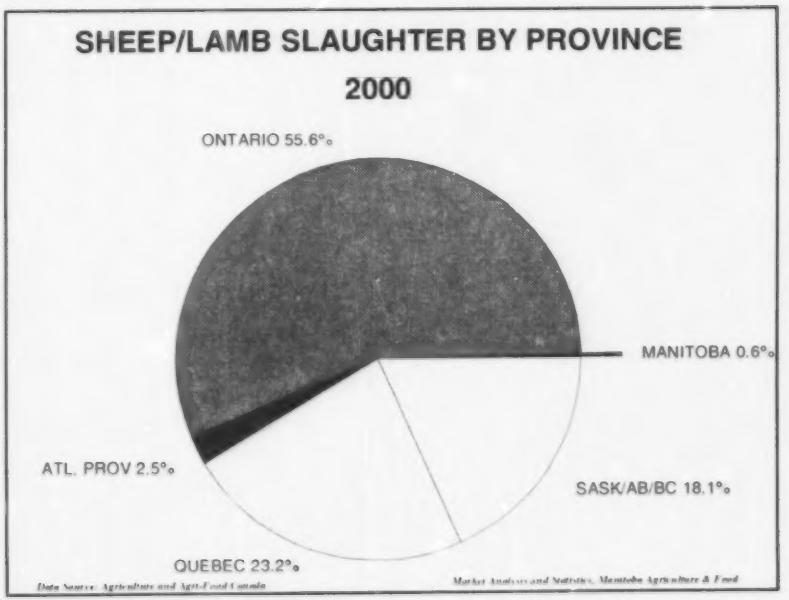


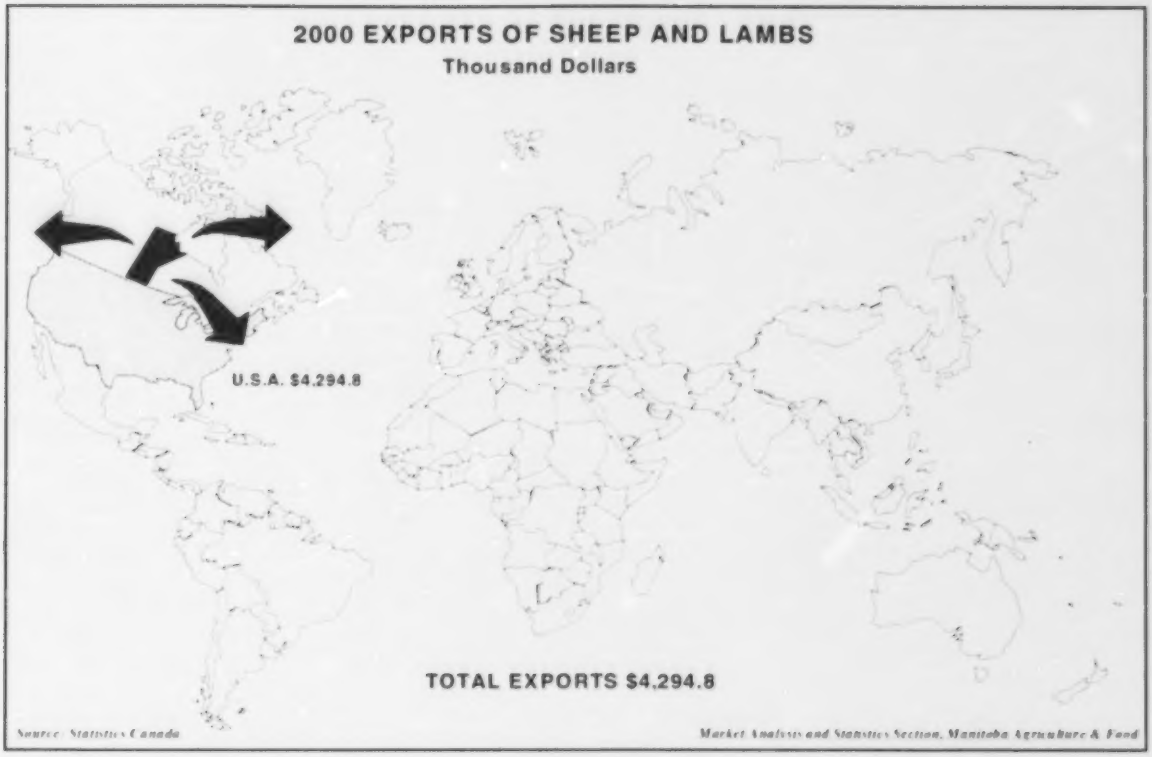
DATA SOURCE: Manitoba Agriculture & Food, Statistics Canada, Agriculture & Agri-Food Canada, Canada Co-operative Wool Growers Ltd., Alberta Agriculture, Food & Rural Development, Manitoba Sheep Producers.

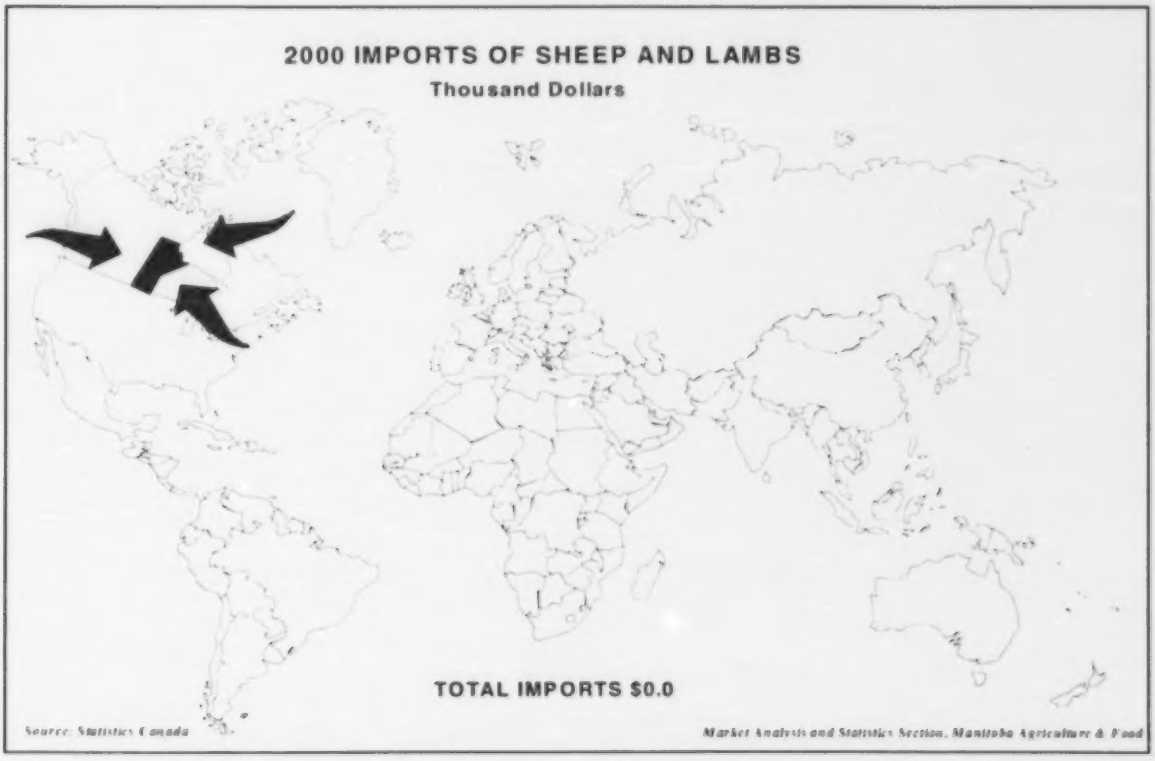

SHEEP AND LAMBS ON MANITOBA FARMS
1976-2000
Total Sheep and Lambs
Ewes
THOUSAND HEAD
YEAR
Market Analysis and Statistics, Manitoba Agriculture & Food


VALUE OF LAMB PRODUCTION
1981-2000
MILLION DOLLARS
YEAR
Market Analysis and Statistics, Manitoba Agriculture & Food

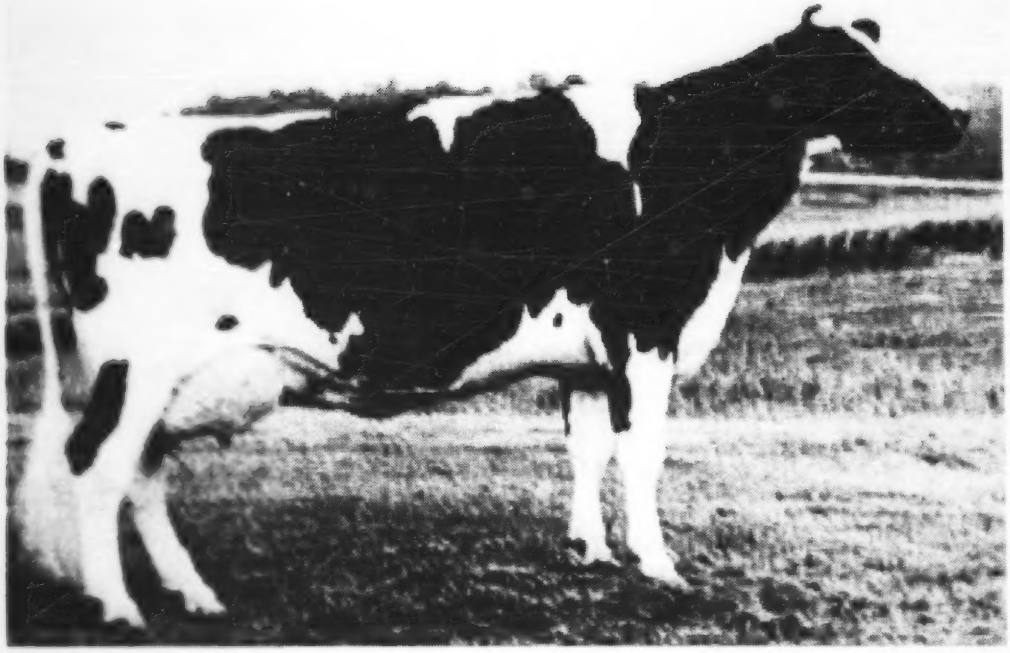

SEASONAL LAMB (A,B 80-94 LB) PRICES
WINNIPEG, 1997- 2000 VS 5-YR AVERAGE
PRICE ($ PER CWT)
5-YR AV.(1992-96)
1997
1998
1999
2000
MONTH
Market Analysis and Statistics, Manitoba Agriculture & Food


SHEEP/LAMB SLAUGHTER BY PROVINCE
2000
ONTARIO 55.6%
MANITOBA 0.6%
ATL. PROV 2.5%
SASK/AB/BC 18.1%
QUEBEC 23.2%
Market Analysis and Statistics, Manitoba Agriculture & Food


2000 EXPORTS OF SHEEP AND LAMBS
Thousand Dollars
U.S.A. $4,294.8
TOTAL EXPORTS $4,294.8
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture & Food


2000 IMPORTS OF SHEEP AND LAMBS
Thousand Dollars
TOTAL IMPORTS $0.0
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture & Food

DAIRY SECTOR



DAIRY SECTOR PROFILE

Production:

Manitoba has Canada's fifth largest dairy cow herd with 4.2 percent of the nation's dairy cows and 0.5 percent of total North American dairy cows in 2000. According to Statistics Canada, total dairy cow numbers in Manitoba have declined fairly steadily over the past twenty-four years from 92,000 head on December 31, 1976 to 49,000 head on December 31, 2000, an average decrease of more than two percent a year. The actual number of dairy cows producing milk within the supply management (quota) system fell by 1.4 percent from 35,500 on December 31, 1999 to 35,000 on December 31, 2000. Although the number of commercial milk and cream shippers declined by 6.6 percent to 638 at the end of 2000, they sold 293.8 million litres of milk and cream, two percent more than in 1999. The productivity of Manitoba dairy cows has increased significantly since 1977, when 3.1 kl of milk and cream were sold per cow per year compared to 6.3 kl per cow (8.5 kl per cow within the supply management quota system) in 2000.

Milk and Cream Sales:

Farm cash receipts from milk and cream sold in 2000 amounted to $156.2 million, 5 percent of the total farm cash receipts for the province. About 38 percent of dairy cash receipts came from sales of milk for fluid use, about 61 percent were from sales for industrial milk use, 0.06 percent from industrial cream sales and the remaining 1.4 percent were supplementary payments to dairy producers.

Dairy Processing:

Manitoba's dairy processing industry comprised three fluid milk plants, twelve industrial plants, two repackaging plants for cheese and milk powder and two research and development facilities with a total of more than 470 employees in 2000. Another 400 employees were involved in the distribution of dairy products.

The fluid milk plants were Lucerne Foods Ltd. and Parmalat Dairy and Bakery Inc, both in Winnipeg, and Dairyworld Foods in Brandon. Manitoba had six cheese plants located in Grunthal (Medo-Land Dairy Products), Holland (Trappist Cistercian Abbey), New Bothwell (Bothwell Co-operative Dairy Society Ltd.), Souris (Saputo Foods Ltd.), Winkler (Armstrong Cheese Company Ltd. purchased by Saputo Food, Ltd in 2000) and Arden (Riverridge Dairy operated by the Riverside Hutterite Colony). There were three ice cream plants, Goodlife in Neepawa and Lucerne Foods Ltd. in Winnipeg and, a new operation in 2000, Nicole's Desserts, Inc. in Winnipeg. There is also a creamery/powdered milk plant, Parmalat Foods Inc., located at St. Claude, a creamery, Notre Dame Creamery Ltd., at Notre Dame and a multi-product dairy, Rockwood Agribusiness. The repackaging plants were Lucerne Foods Ltd. (cheese) and Medallion Milk Co. Ltd. (milk powder) located in Winnipeg. There were also two research and development facilities licensed to process dairy products, the University of Manitoba in Winnipeg and the Food Development Centre in Portage la Prairie.

Dairy products produced in the province, which were valued at over $300 million in 2000,

included fluid milk (99.1 Ml), cream (3.2 Ml), butter, ice-cream, Cheddar cheese (9.9 kt), variety cheeses (5.0 kt) and frozen yogurt. Milk production in 2000 increased by 1.2 percent from the 1999 level, the production of Cheddar cheese rose by 39 percent, while variety cheese production declined by 19 percent.

Trade:

Small quantities of milk and cream products, cheese and whey were imported from countries such as the United States, Denmark, Italy and the Netherlands in 2000, while Manitoba exported dry whey protein concentrate to the United States. Unlike previous years, there was very little skim milk powder exported in 2000. Dairy products are used in further processed products, which are exported to other provinces or countries. About one fifth of the butter produced is exported in products such as cookies.

A World Trade Organization (WTO) ruling that Canada's dairy export program for the removal of surplus milk was illegal meant that skim milk powder made from surplus milk could not be exported after August 2000. From August to November 2000, 163 Manitoba dairy producers sold 1.4 million litres of over-quota milk at 10 cents per litre to the non-food market. As milk prices for non-food purposes are only a small fraction of the price paid for quota milk, an alternative deregulated commercial export process, which was believed to be WTO compliant, was introduced. Contracts are made between milk producers and processors/ exporters with no influence by government or marketing boards. Processors who want to access Canadian milk for export products can post their contract offer to milk producers on a website, www.exportcontracts.org. Through export contracts from August 2000 to April 2001, Manitoba milk producers sold 3.1 million litres at prices ranging from 25.5 to 27.9 cents per litre.

Potential:

Under the supply management system, the production of milk for domestic use and traditional export markets is controlled by quota allocations. However, new markets for various types of cheese and other dairy products for export and import replacement are available. Since August 1, 1995, there has been a system in place whereby processors, who want to access these markets, have been able to obtain contracts to purchase milk at world competitive prices to enable them to compete on world markets.

DAIRY SECTOR

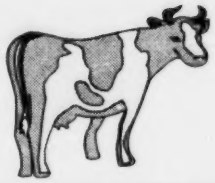
	1997	1998	1999[R]	2000[P]	2000 as a % of '99
NUMBER OF DAIRY FARMS- DEC 31:	829	748	683	638	93
Milk Shippers	772	722	673	631	94
Cream Shippers	57	26	10	7	70
DAIRY CATTLE ON FARMS ('000) - DEC 31:					
All Dairy Cows	53.0	50.0	49.5	49.0	99
% of Canada	4.4	4.2	4.3	4.2	
Dairy Replacement Heifers > 1 year	17.0	16.0	15.0	15.0	100
Cows in supply management system	37.0	36.0	35.5	35.0	99
PRICE OF MILK (Class 1 $/hl):	64.73	64.26	62.25	61.77	99
FARM SALES - MILK/CREAM (000 kl):	281.0	285.8	288.5	293.8	102
Fluid Use	110.4	105.9	109.9	112.4	102
Industrial Use:	170.6	179.9	178.5	181.5	102
Milk	169.5	179.2	178.1	181.0	102
Cream	1.1	0.7	0.4	0.5	115
FARM CASH RECEIPTS ($ million):	145.0	149.9	155.4	156.2	101
Fluid Use	N/A	N/A	N/A	N/A	
Industrial Use:	N/A	N/A	N/A	N/A	
Milk	N/A	N/A	N/A	N/A	
Cream	0.2	0.1	0.08	0.09	113
Supplementary Payments	4.5	4.0	3.1	2.2	69
DAIRY PRODUCT PROCESSING:					
Fluid Milk Plants (No.)	3	3	3	3	100
Industrial Milk Plants (No.)	13	11	14	14	100
Milk Transporters (No.)	18	16	16	14	88
Industry Employees:					
Plant Processing	500	482	490	470	96
Bulk Milk Haulers	78	75	72	67	93
Product Distribution	400	400	400	400	100
PROCESSED DAIRY PRODUCTS:					
Fluid Milk ('000 kl)	100.0	96.0	97.9	99.1	101
Cream ('000 kl)	3.0	3.0	3.8	3.2	84
Ice-Cream ('000 kl)	N/A	N/A	N/A	N/A	N/A
Butter ('000 tonnes)	N/A	N/A	N/A	N/A	N/A
Cheddar Cheese ('000 tonnes)	7.2	7.9	7.1	9.9	139
Other Cheese ('000 tonnes)	4.9	5.4	6.2	5.0	81
EXPORTS OF DAIRY PROD. - tonnes	1,540.9	866.5	865.0	34.3	4
- $ million	3.5	1.9	1.6	0.1	6
IMPORTS OF DAIRY PROD. - tonnes	3,397.7	3,388.8	5,421.6	7,318.2	135
- $ million	3.9	4.3	5.3	7.0	132

DAIRY INDUSTRY CHART, 2000

ANNUAL OPERATING/ CAPITAL COSTS:
($ million)

TOTAL:	**145**
FEED:	43
OTHER OP:	42
FIXED:	24
LABOUR:	36

PRODUCERS	**NUMBER**
MILK SHIPPERS	631
CREAM SHIPPERS	7
FULL-TIME EMPLOYEES	1,300



INVENTORY CHANGE IN 2000: -500 HEAD

IMPORTS OF BREEDING STOCK: N/A

DAIRY CATTLE ON DEC 31:

TOTAL MILK COWS	49,000 HEAD
HEIFERS >1YR	15,000 HEAD
COWS U/QUOTA	35,000 HEAD

EXPORTS OF BREEDING STOCK N/A

PRODUCTION:	**MILLION LITRES**	**MILLION $**
MILK FOR FLUID PURPOSES	112.4	N/A
INDUSTRIAL: MILK	181.0	N/A
CREAM	0.5	N/A
SUPPLEMENTARY PAYMENT		2.2
TOTAL	**293.8**	**156.2**

MANITOBA MILK PRICES REVIEW COMMISSION

CANADIAN MILK SUPPLY MANAGEMENT COMMITTEE

CANADIAN DAIRY COMMISSION

MANITOBA MILK PRODUCERS

14 MILK TRANSPORTERS
40 VEHICLES

INDUSTRY EMPLOYEES

PROCESSING PLANTS	470
BULK MILK HAULERS	67
DISTRIBUTION	400

3 FLUID MILK PLANTS:

	'000 LITRES
FLUID MILK	99,100
CREAM	3,200

14 INDUSTRIAL PLANTS:

	000 KG
BUTTER	N/A
CHEDDAR CHEESE	9,860
VARIETY CHEESE	5,010
YOGURT	N/A
ICE-CREAM	N/A

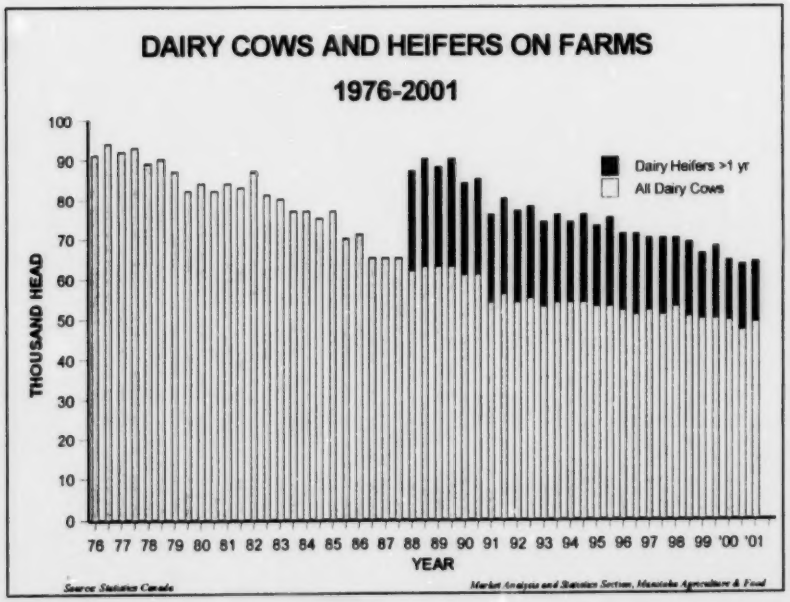
IMPORTS	**000 KG**
MILK AND CREAM	22.3
WHEY & OTHER PROD.	6,782.2
CHEESE PRODUCTS	513.7
YOGURT	N/A

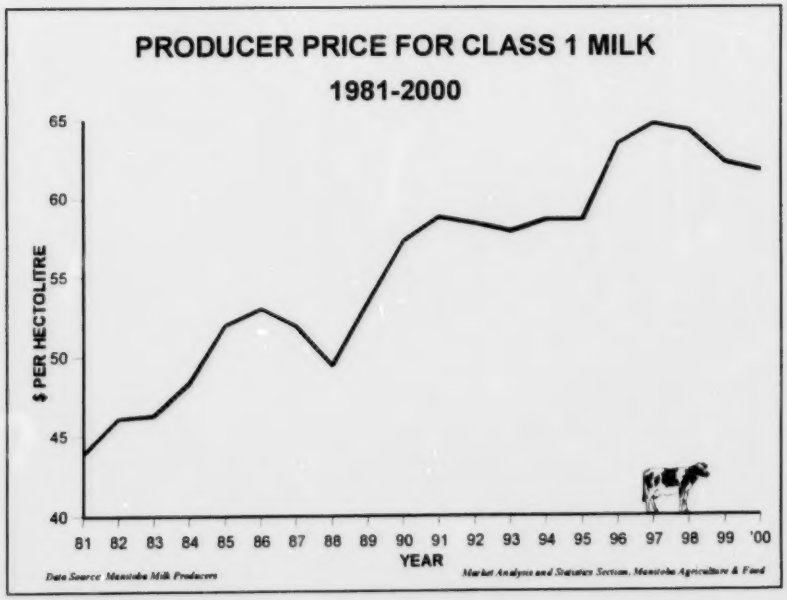
VALUE ($ MILLION) 7.0

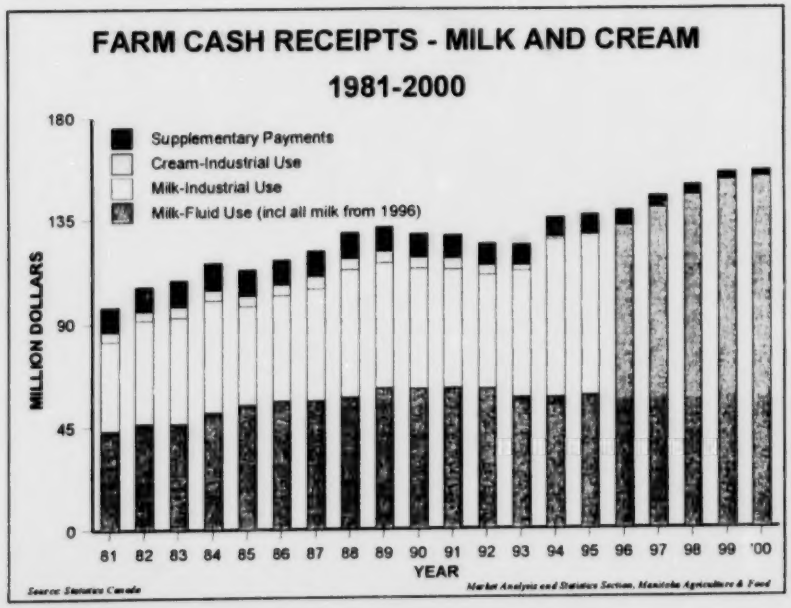
EXPORTS	**000 KG**
SKIM MILK POWDER	0.0
CHEESE	N/A
WHEY PROTEIN CONC.	34.3

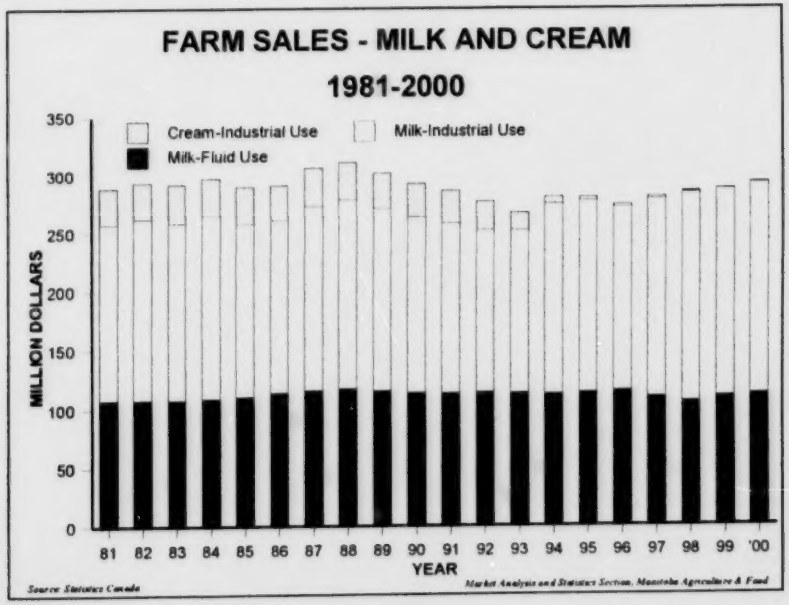
VALUE ($ MILLION) 0.1

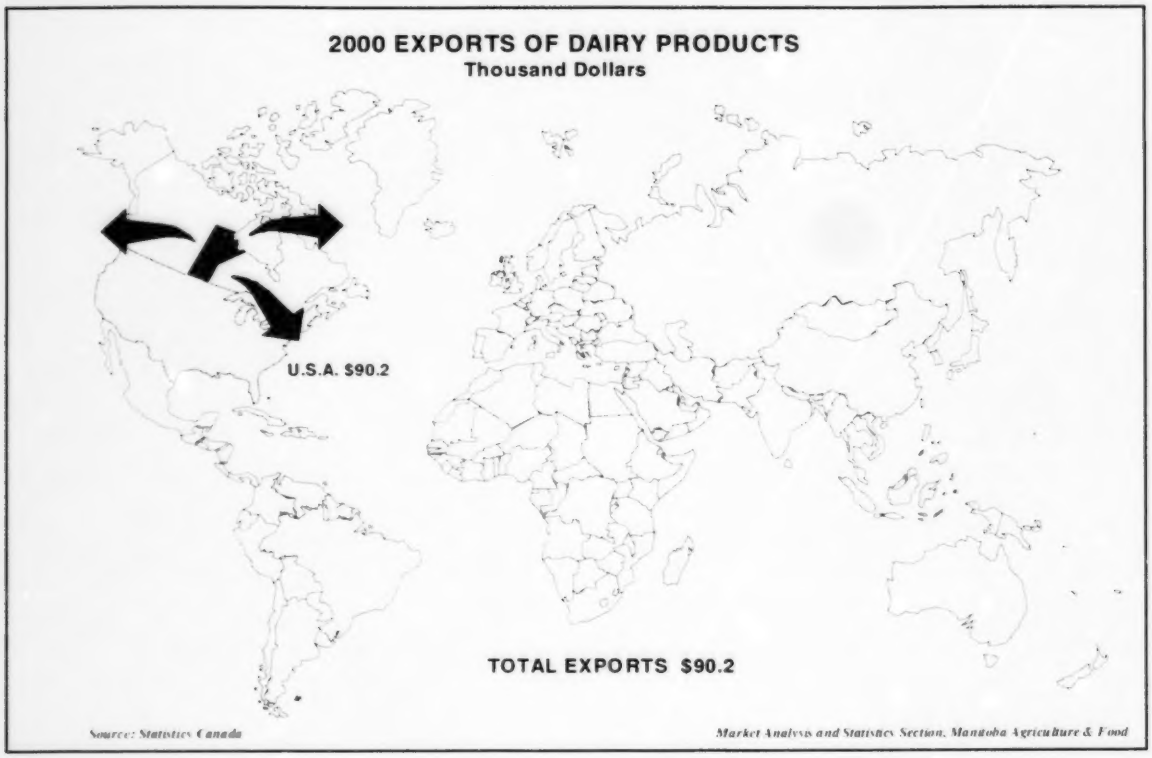
DATA SOURCE: Manitoba Milk Producers, Manitoba Agriculture and Food, Statistics Canada

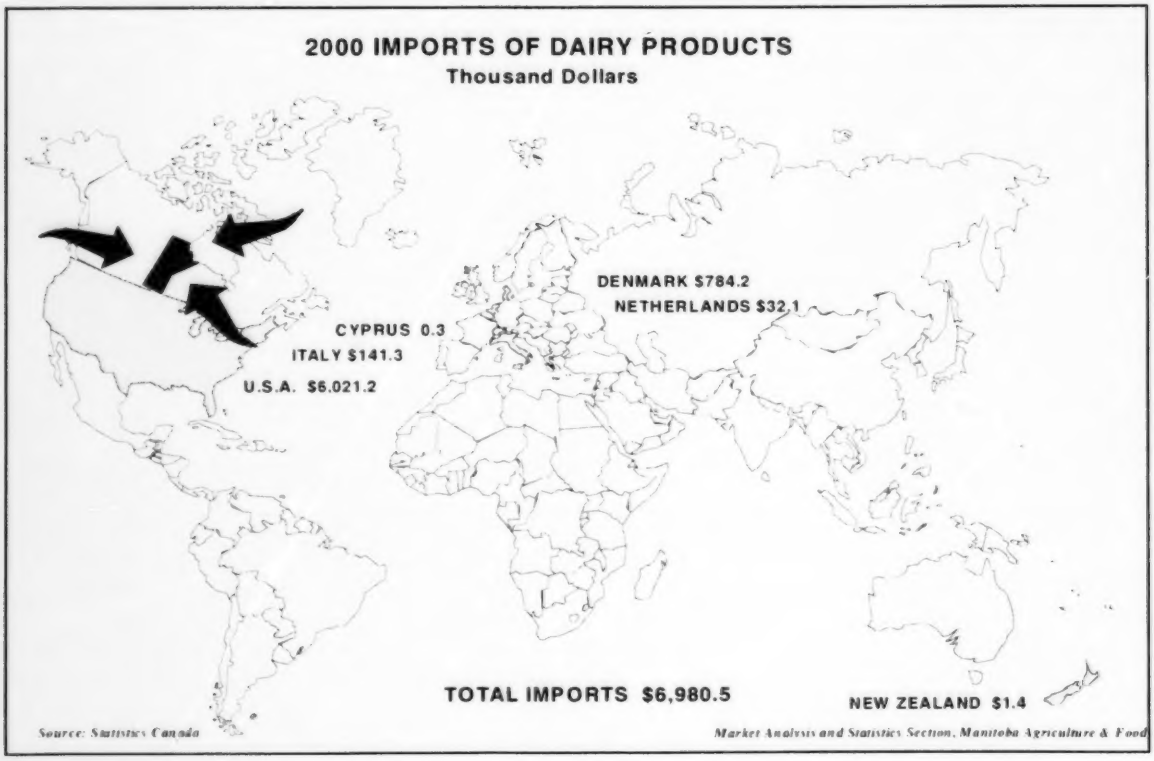

DAIRY COWS AND HEIFERS ON FARMS
1976-2001
THOUSAND HEAD
YEAR
Dairy Heifers >1 yr
All Dairy Cows
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture & Food


PRODUCER PRICE FOR CLASS 1 MILK
1981-2000
$ PER HECTOLITRE
YEAR
Data Source: Manitoba Milk Producers
Market Analysis and Statistics Section, Manitoba Agriculture & Food


FARM CASH RECEIPTS - MILK AND CREAM
1981-2000
MILLION DOLLARS
YEAR
Supplementary Payments
Cream-Industrial Use
Milk-Industrial Use
Milk-Fluid Use (incl all milk from 1996)
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture & Food


FARM SALES - MILK AND CREAM
1981-2000
MILLION DOLLARS
YEAR
Cream-Industrial Use
Milk-Industrial Use
Milk-Fluid Use
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture & Food


2000 EXPORTS OF DAIRY PRODUCTS
Thousand Dollars
U.S.A. $90.2
TOTAL EXPORTS $90.2
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture & Food


2000 IMPORTS OF DAIRY PRODUCTS
Thousand Dollars
DENMARK $784.2
NETHERLANDS $32.1
CYPRUS 0.3
ITALY $141.3
U.S.A. $6,021.2
TOTAL IMPORTS $6,980.5
NEW ZEALAND $1.4
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture & Food

HORSE SECTOR

HORSE SECTOR PROFILE

Production:

Manitoba has a suitable resource base for horse production in terms of land, water, feed and labour. As a result, Manitoba's equine industry is the third largest in Canada with approximately 4,120 farms and 65,500 horses, about 15 percent of the horses in Canada. Manitoba has Canada's largest herd of mares used for pregnant mares' urine (PMU) collection. For the 2000-2001 season, 252 PMU ranches had 26,898 mares, of which 18,267 mares were in production, a decrease of two farms, but an increase of 440 production mares from the previous season.

There are also a large number of pleasure horse owners in Manitoba, who had about 12,000 horses in 2000, as well as a much smaller number of racehorse owners, who had approximately 1,000 horses, including 360 thoroughbreds and 120 harness racing horses in competition during the year.

Horse Sales:

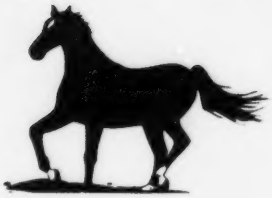
The Brandon location of Ayerst Organics Ltd., the sole purchaser and processor of pregnant mares' urine in North America, has allowed Manitoba to develop a viable equine industry over the past thirty-four years. Foals are produced as part of the PMU operation and these are kept as replacement mares or sold for breeding stock, for the pleasure industry, for rodeo events or as ranch stock. About 40 percent of the foals are sold to finishing enterprises, fewer than half of these being marketed by public auction. Some colts fed in Manitoba feedlots are sold to Bouvry Exports Ltd. of Fort McLeod, Alberta, the rest going to plants in the United States or to Superior Exports of Owen Sound, Ontario. Very little horse meat is consumed in Canada. Most of the horse meat produced in Alberta is exported (9,849 tonnes valued at $51.5 million in 2000) to the EU, Japan, Mexico and the United States. Only 12 horses were processed in Manitoba provincially-inspected plants in 2000. Horse sales were valued at $15 million in 2000.

PMU Sales:

The Manitoba PMU industry contributes about $40-50 million in farm cash receipts each year. For calendar year 2000, the farm value of pregnant mare's urine totalled $43.9 million or over one percent of total value of agricultural production in the province. The urine is used for Premarin production.

Trade:

Manitoba exported 3,244 horses to the United States and other locations in 2000, of which 27 were pure-bred stock. This was a 55 percent decrease from the 1999 level. There were 117 pure-bred breeding horses imported from the United States in 2000.



HORSE SECTOR

	1997	1998[R]	1999[R]	2000[P]	2000 as a % of '99
NO. OF HORSE FARMS:	4,150	4,130	4,120	4,120	100
P.M.U. Farms - beginning of year	283	265	259	254	98
- end of year	265	259	254	252	99
HORSES ON FARMS:					
All P.M.U. Mares	23,016	26,766	24,985	26,898	108
P.M.U. Production Mares - Jan 1	22,254	18,014	20,364	17,827	88
P.M.U. Production Mares - Dec 31	18,014	20,364	17,827	18,267	102
Total Horses - July 1	65,000	67,000	65,000	65,500	101
HORSE SALES (est. no.):	15,500	17,000	19,000	16,200	85
VALUE OF SALES ($'000):					
P.M.U. Sales	39,400	37,590	40,750	43,910	108
Horse Sales	11,000	12,000	16,000	15,000	94
HORSE PRICES - WINNIPEG ($/cwt):					
Under 1,000 lb	45-80	45-75	70-100	59 - 80	80
1,000 lb and over	45-80	70-90	75-115	70-105	91
AVERAGE EXPORT PRICE ($/head):	756	745	841	940	112
For breeding	3,855	1,545	3,200	4,190	131
For slaughter/other	741	743	836	913	109
HORSE PROCESSING (head):					
Inspected Slaughter in Manitoba	28	9	5	12	240
EXPORTS OF HORSES:					
To U.S.A.: Total Number	5,143	7,952	7,253	3,244	45
Pure-bred	24	19	15	27	180
Slaughter	2,659	6,157	5,784	1,918	33
Other	2,460	1,776	1,454	1,299	89
Value ($'000)	3,886	5,924	6,101	3,049	49
To Eastern Canada: Total Number	2,378	4,106	2,721	2,937	108
Slaughter	1,828	392	753	2,233	297
Other	550	3,714	1,968	704	36
To Western Canada	8,000	5,000	9,000	10,000	111
IMPORTS OF HORSES:					
From U.S.A.: Number	209	119	50	117	234
Value ($'000)	1,943	551	551	906	164

HORSE INDUSTRY CHART, 2000

EQUINE RANCH (PMU) ANNUAL OPERATING & CAPITAL COSTS:
($ million)

FEED	7.0
OTHER OP:	9.5
FIXED:	7.8
LABOUR:	3.2
TOTAL:	**27.5**

HORSE FARMS: 4,120
(EQUINE RANCH: 252)
INVENTORY :
TOTAL PMU MARES -
JAN 1/ 00: 26,898
PMU MARES IN PRODUCTION -
DEC 31/00: 18,267
ALL HORSES JULY1/ 00: 65,500

BREED. STOCK OUT:
USA/OTHER: 27 HEAD

IMPORTS:
USA: 117 HEAD

PLEASURE AND RACE HORSE INDUSTRIES

VALUE OF PREGNANT MARE'S URINE FOR PREMARIN PROD:
$43.9 MILLION

EQUINE RANCH HORSE SALES:
16,200 HEAD

EXPORTS OF FINISHED HORSES:

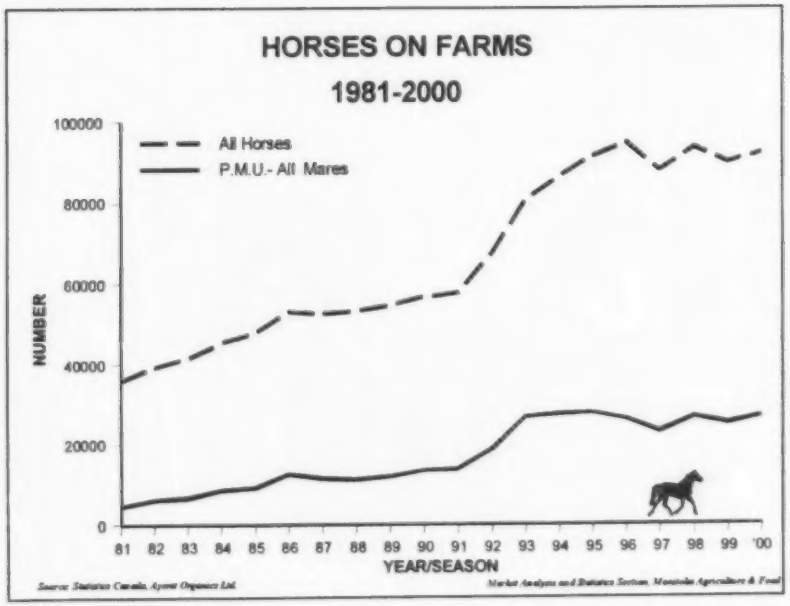
USA:	1,918 HEAD
ALBERTA[E]:	10,000 HEAD
ONTARIO:	2,233 HEAD

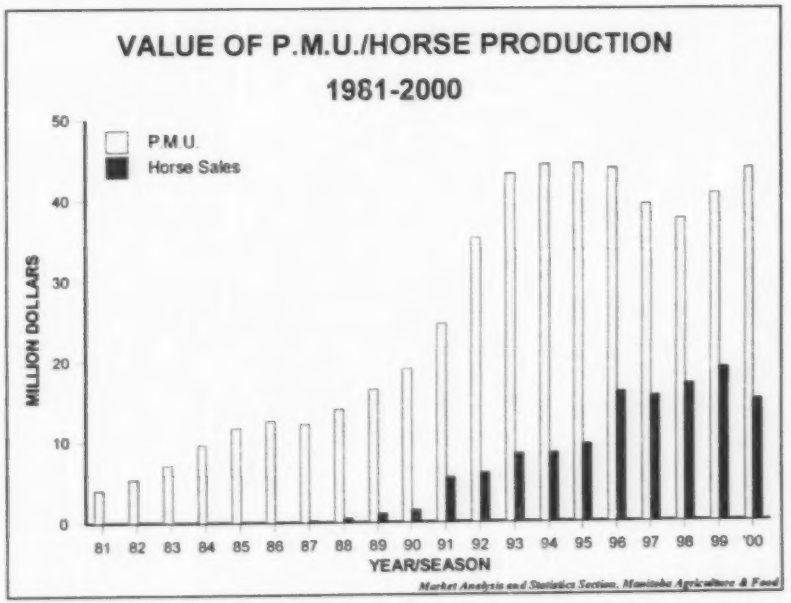
PROCESSED IN MANITOBA:
12 HEAD

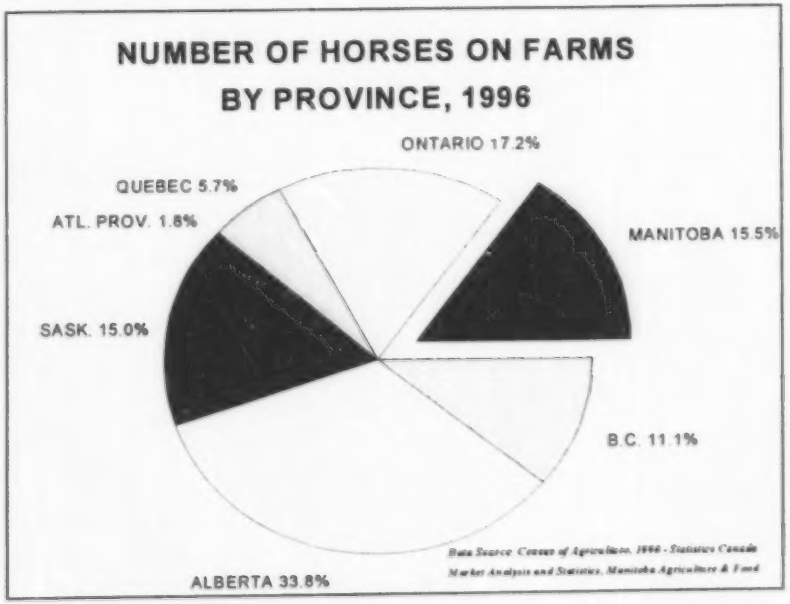
EXPORTS OF OTHER HORSES:

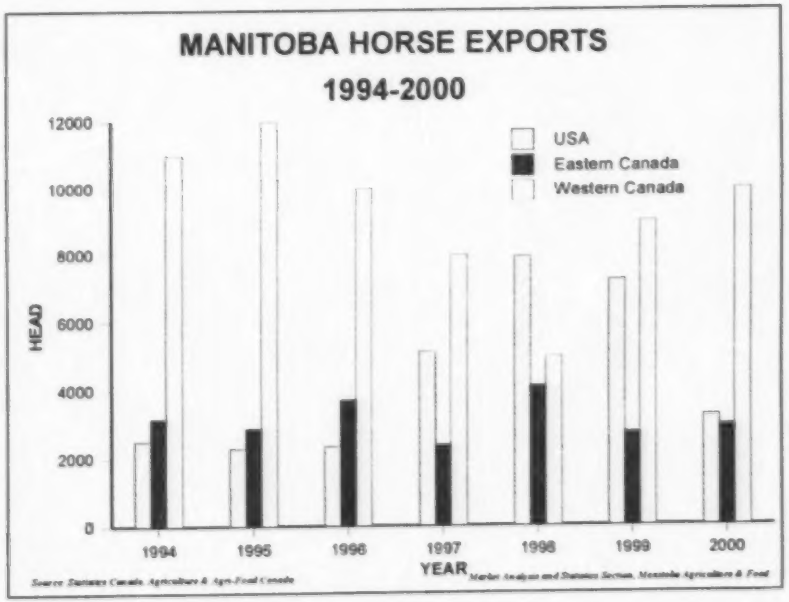
USA:	1,299 HEAD
ONTARIO:	704 HEAD

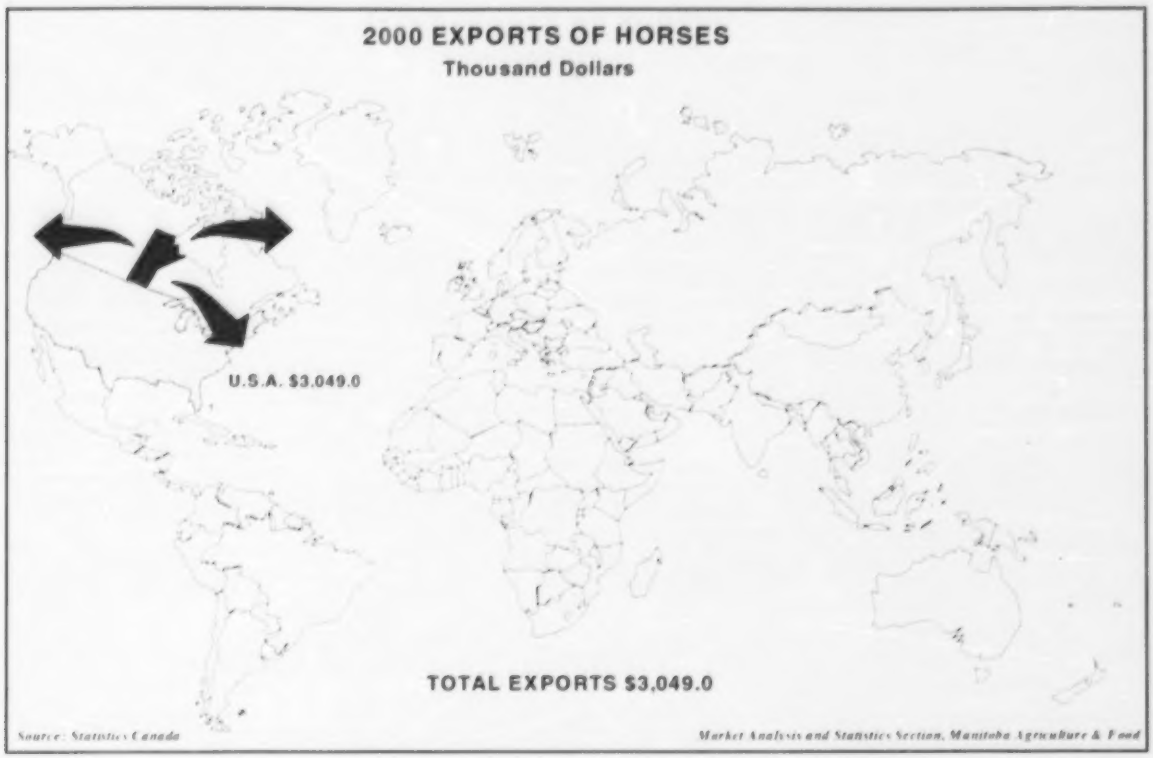
DATA SOURCE: Manitoba Agriculture and Food, Statistics Canada, Agriculture & Agri-Food Canada, Ayerst Organics Ltd.

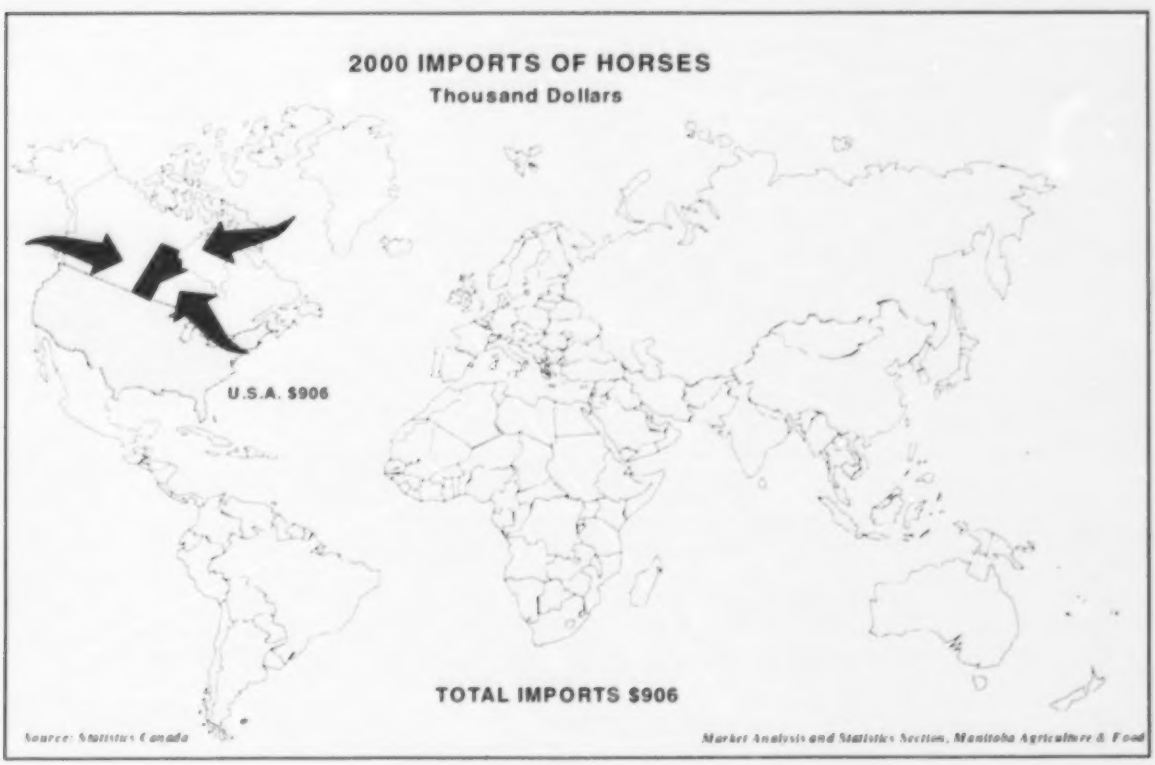

HORSES ON FARMS
1981-2000
All Horses
P.M.U.- All Mares
NUMBER
100000
80000
60000
40000
20000
0
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 '00
YEAR/SEASON


VALUE OF P.M.U./HORSE PRODUCTION
1981-2000
P.M.U.
Horse Sales
MILLION DOLLARS
50
40
30
20
10
0
81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 '00
YEAR/SEASON
Market Analysis and Statistics Section, Manitoba Agriculture & Food

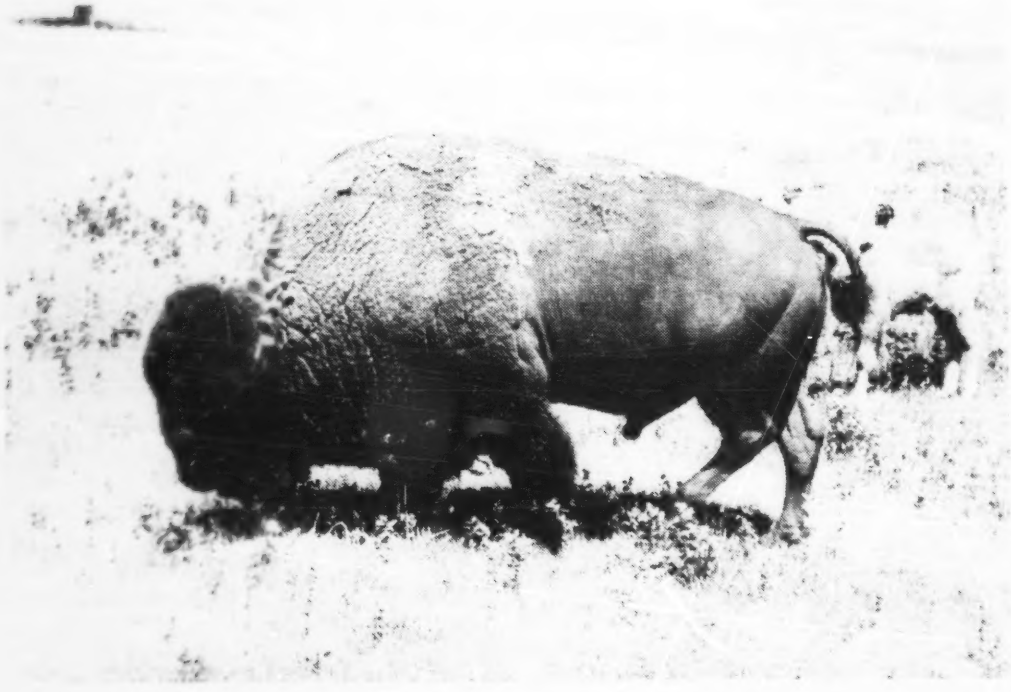

NUMBER OF HORSES ON FARMS
BY PROVINCE, 1996
ONTARIO 17.2%
QUEBEC 5.7%
ATL. PROV. 1.8%
MANITOBA 15.5%
SASK. 15.0%
B.C. 11.1%
ALBERTA 33.8%
Data Source: Census of Agriculture, 1996 - Statistics Canada
Market Analysis and Statistics, Manitoba Agriculture & Food


MANITOBA HORSE EXPORTS
1994-2000
USA
Eastern Canada
Western Canada
HEAD
12000
10000
8000
6000
4000
2000
0
1994 1995 1996 1997 1998 1999 2000
YEAR
Source: Statistics Canada, Agriculture & Agri-Food Canada
Market Analysis and Statistics Section, Manitoba Agriculture & Food


2000 EXPORTS OF HORSES
Thousand Dollars
U.S.A. $3,049.0
TOTAL EXPORTS $3,049.0
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture & Food


2000 IMPORTS OF HORSES
Thousand Dollars
U.S.A. $906
TOTAL IMPORTS $906
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture & Food

BISON SECTOR



BISON SECTOR PROFILE

Production:

Bison are indigenous to the Prairies and adapt well to most geographic areas of Manitoba. Although not as large as the cattle and hog industries, Manitoba's bison industry is the third largest in Canada, producing about 12 percent of national bison production annually and approximately three percent of total North American production in 2000. The number of bison in Manitoba has increased by an average of 19 percent annually over the past four years and is expected to expand further.

In 2000, Manitoba's 180 operators had a breeding herd of about 7,900 head, which produced an estimated 6,300 calves. There were 2,500 feeder bulls being finished on a grain/roughage ration in 2000, some of which were originally brought in from Western Canada. The total number of bison on Manitoba farms in 2000 was about 14,000 head, an increase of 27 percent from the 1999 level.

The value of bison produced in 2000 was more than $14 million, almost 0.5 percent of the total value of agricultural production in the province.

Marketings and Exports:

In 2000, over 360 bison were brought into Manitoba from the United States, Ontario, Saskatchewan and Alberta. Some of these animals were feeder bulls, the remainder being calves and breeding stock. There were about 1,525 feeder bulls finished in the province in 2000, most of which were exported for slaughter at the North American Bison Co-operative plant, North Dakota, for prices averaging US$2.23/lb (carcass weight). Sales of breeding stock and calves to the United States, Quebec, Alberta and Saskatchewan increased by 30 percent to more than 600 head in 2000.

Bison Slaughter:

There were 79 bison slaughtered in 14 Manitoba provincially-inspected plants in 2000, 44 percent higher than the 1999 level. Much of the bison meat sold in Manitoba is to restaurants. Inspected meat, including Buffalo Nickel™ brand bison meat products, can also be obtained from various bison ranches across the province, such as Buffalo Mountain Ranch, Miami; Little River Ranch, Kleefeld; Silver Creek Bison Ranch, Binscarth: Sunray Bison, Clanwilliam; Wilson River Bison, Gilbert Plains and Vestford Ranches, Teulon. Most of these ranches also sell bison breeding stock, hides/robes and bison leather products.

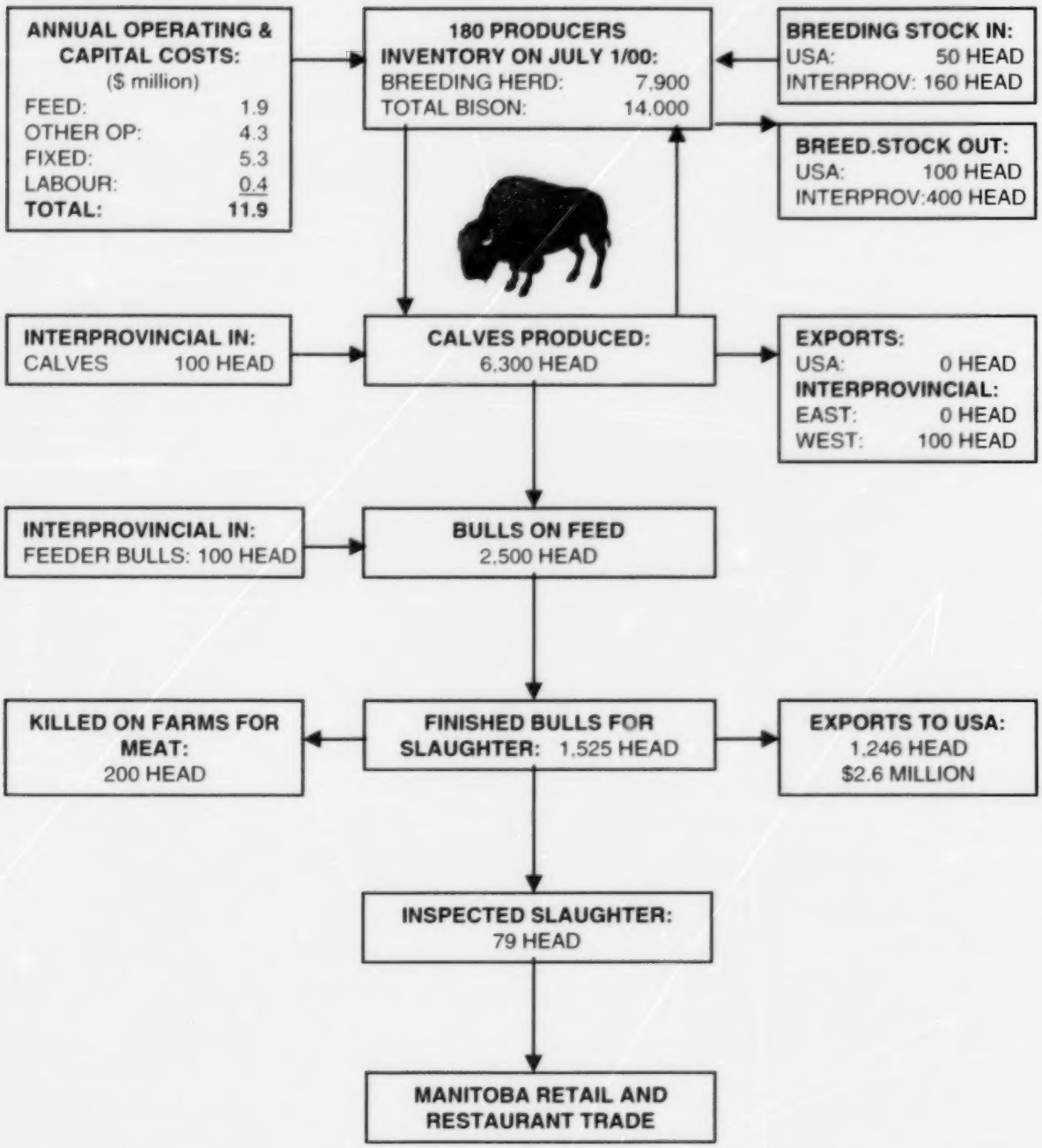
Potential:

Manitoba has the potential to continue to increase bison production and processing to supply international and domestic markets. Producers continue to improve management skills and lower production costs.

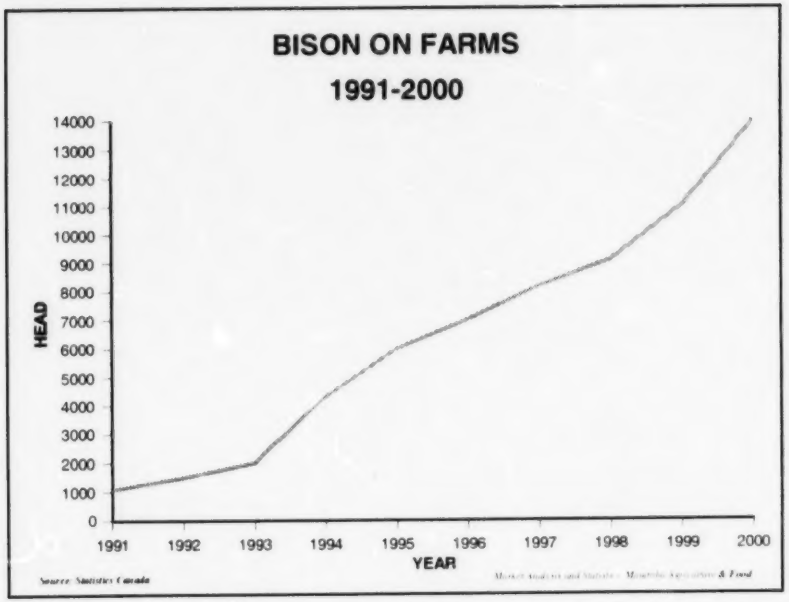
BISON SECTOR

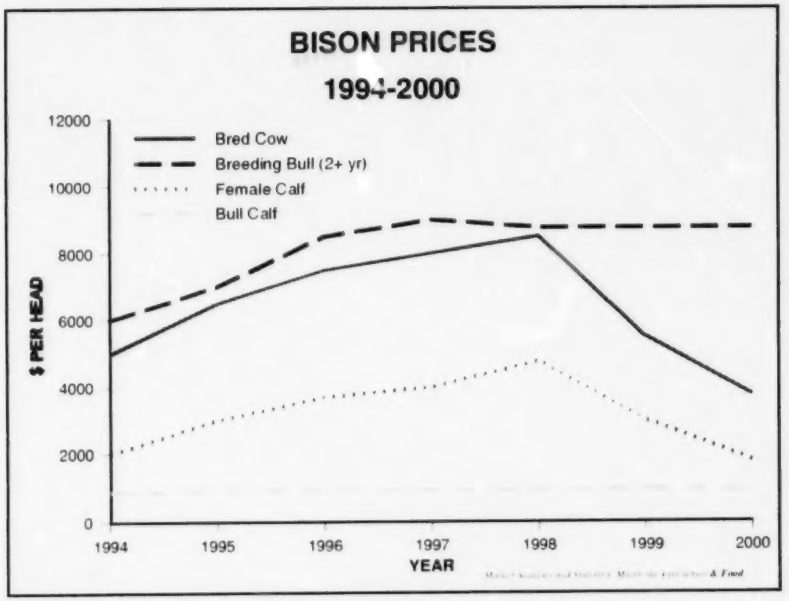
	1997	1998[R]	1999[R]	2000[P]	2000 as a % of '99
NO. OF BISON FARMS:	98	130	180	180	100
BISON ON FARMS JULY 1 (No.):					
Breeding Herd & Replacements	4,700	5,100	6,000	7,900	132
Bulls On Feed	1,000	1,400	2,000	2,500	125
Total Bison	8,200	9,100	11,000	14,000	127
% of Canada	-	-	12.5	12.5	
CALF PRODUCTION (No.):	3,500	4,000	4,700	6,300	134
VALUE OF BISON PRODUCT'N ($'000):	8,500	9,300	12,000	14,000	117
EST. BISON PRICES ($/head):					
Bred Cow	8,000	8,500	5,500	3,750	68
Breeding Bull (2+ yr)	9,000	8,750	8,750	8,750	100
Female Calf	4,000	4,750	3,000	1,800	60
Bull Calf	950	950	975	912	94
Slaughter Bull (US$/lb carcass)	2.30	2.23	2.23	2.23	100
BISON SLAUGHTER (head):					
Inspected Slaughter in Manitoba	33	29	55	79	144
% of Canada				N/A	
Killed on farms for meat (est.)				200	
EXPORTS OF BISON (head):					
To United States - breeding	83	132	160	100	63
- slaughter number	694	1,339	1,605	1,246	78
- slaughter value ($'000)	1,334.8	2,137.7	3,312.7	2,645.2	80
To Eastern Canada	4	2	0	0	
To Western Canada	80	300	300	500	167
IMPORTS OF BISON (head):					
From United States	544	250	125	50	40
From Western Canada	1,000	200	300	250	83
From Eastern Canada	100	50	76	10	13
NORTH AMERICAN PER CAPITA DISAPPEARANCE:					
Bison meat (carcass weight (kg))	0.01	0.01	0.01	0.01	100

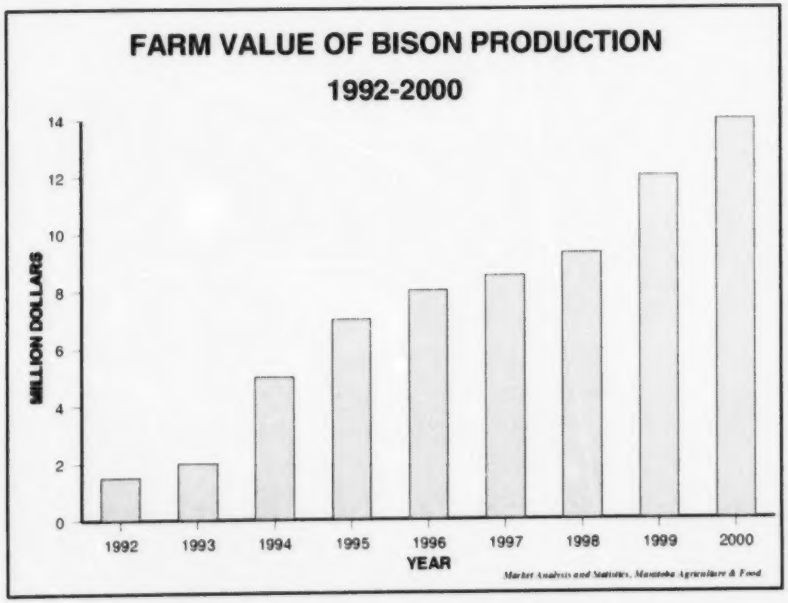
BISON INDUSTRY CHART, 2000

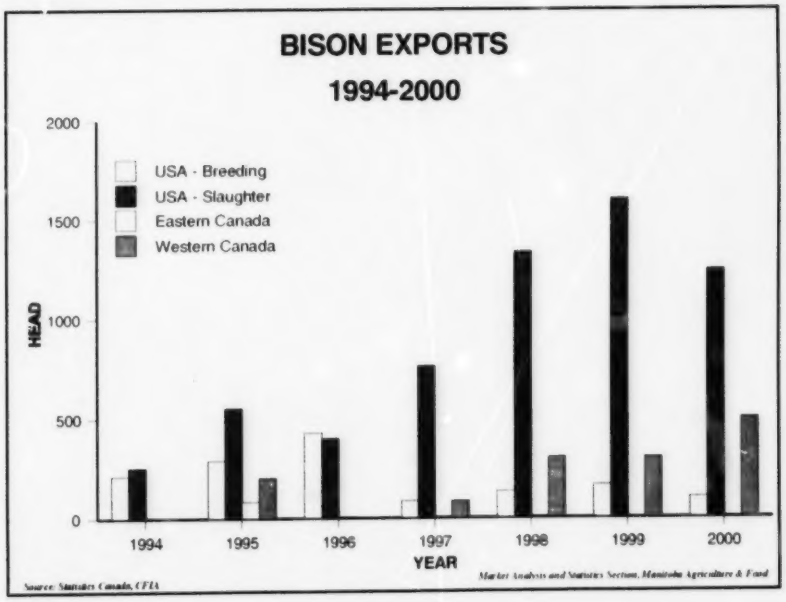


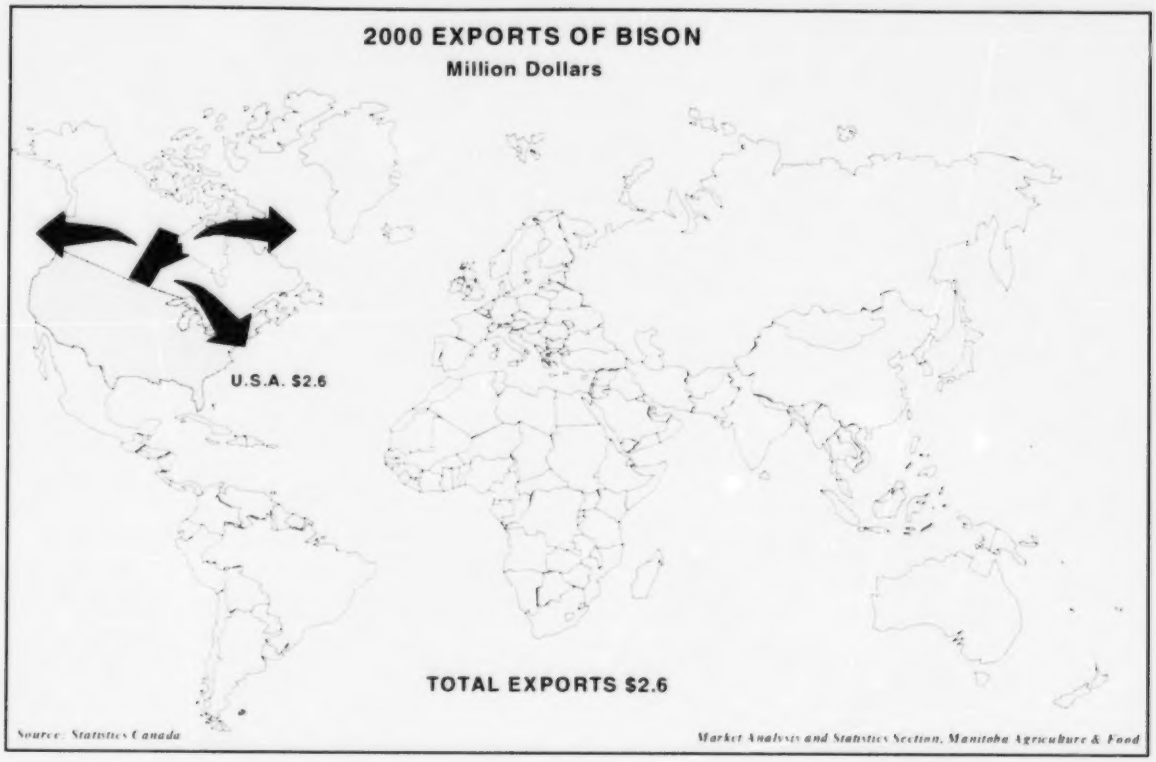
DATA SOURCE: Manitoba Agriculture & Food, Statistics Canada, Agriculture & Agri-Food Canada.

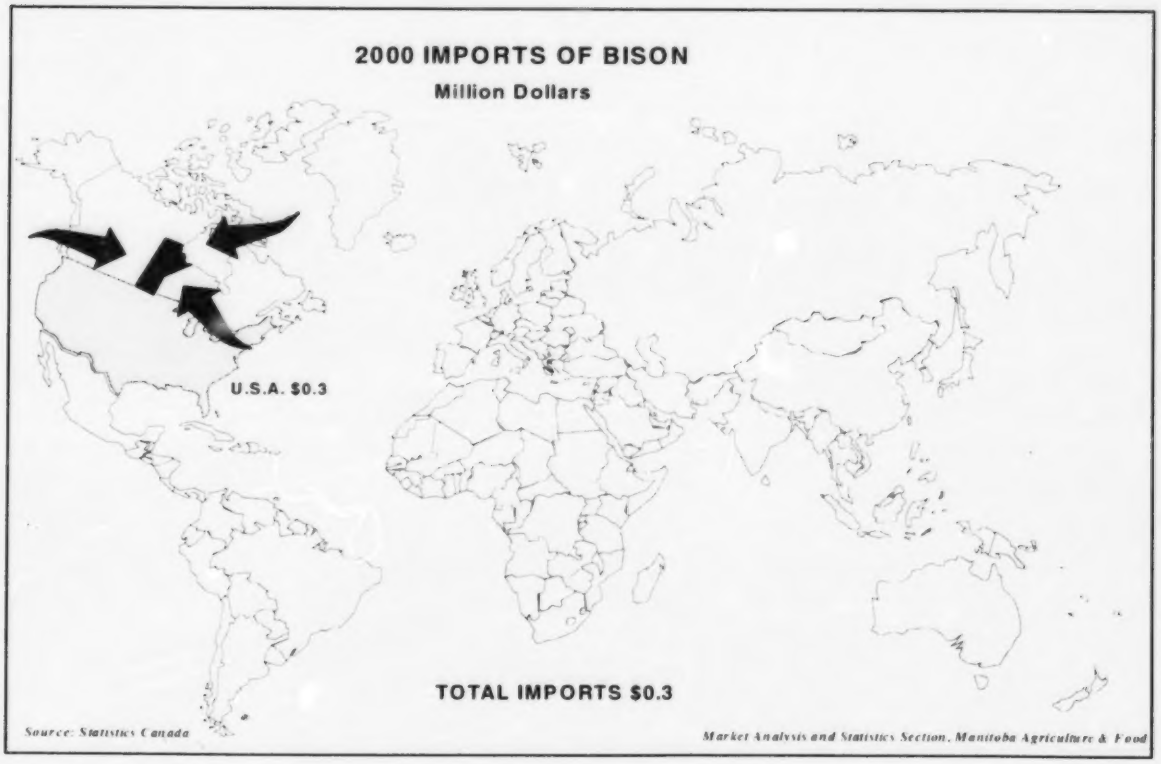

BISON ON FARMS
1991-2000
HEAD
14000
13000
12000
11000
10000
9000
8000
7000
6000
5000
4000
3000
2000
1000
0
1991
1992
1993
1994
1995
1996
1997
1998
1999
2000
YEAR
Source: Statistics Canada
Market Analysis and Statistics, Manitoba Agriculture & Food


BISON PRICES
1994-2000
$ PER HEAD
12000
10000
8000
6000
4000
2000
0
Bred Cow
Breeding Bull (2+ yr)
Female Calf
Bull Calf
1994
1995
1996
1997
1998
1999
2000
YEAR
Market Analysis and Statistics, Manitoba Agriculture & Food


FARM VALUE OF BISON PRODUCTION
1992-2000
MILLION DOLLARS
14
12
10
8
6
4
2
0
1992
1993
1994
1995
1996
1997
1998
1999
2000
YEAR
Market Analysis and Statistics, Manitoba Agriculture & Food


BISON EXPORTS
1994-2000
HEAD
2000
1500
1000
500
0
USA - Breeding
USA - Slaughter
Eastern Canada
Western Canada
1994
1995
1996
1997
1998
1999
2000
YEAR
Source: Statistics Canada, CFIA
Market Analysis and Statistics Section, Manitoba Agriculture & Food


2000 EXPORTS OF BISON
Million Dollars
U.S.A. $2.6
TOTAL EXPORTS $2.6
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture & Food


2000 IMPORTS OF BISON
Million Dollars
U.S.A. $0.3
TOTAL IMPORTS $0.3
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture & Food

GOAT SECTOR

GOAT SECTOR PROFILE

Production:

The Manitoba goat industry is comprised of two main sectors, meat and dairy, as well as smaller sectors, such as those for wool and pets. Manitoba dairy goats are derived from the European breeds, while meat goats are mostly the Boer goat breed. The main "wool" goat breed is the Angora goat, which produces mohair. There are few Angora goats in Manitoba.

Although much smaller than the cattle and hog industries, Manitoba's meat goat industry is the sixth largest in Canada, producing about five-six percent of national goat production annually and over 0.3 percent of total North American meat goat production. Meat goat production in Manitoba increased fairly steadily from 1986 to 1996, but has expanded significantly in the past four years, partly due to the current period of profitable prices. About 659 meat goat producers had close to 13,500 goats on July 1, 2000, a rise of 23 percent from 1999.

There was only one large commercial dairy goat producer in Manitoba with 466 goats in 2000, but there are also small numbers of dairy goats on other farms. Approximately 25 farms had 130-140 dairy goats, which produce milk for farm use. Meat goat production was valued at about $1 million in 2000, while goat milk and dairy products were estimated at $0.3 million.

Marketings, Slaughter and Exports:

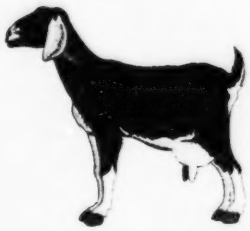
Meat goats are marketed through Manitoba auction markets or sold to brokers, who arrange for the goats to be slaughtered in Manitoba or exported. Goats are also custom-killed for the retail and restaurant markets, and killed on farms, mainly for/by the ethnic trade. Ten provincially-inspected plants in Manitoba killed 217 goats in 2000, a decrease of three percent from 1999. It is estimated that 6,000 goats were slaughtered on farm for/by customers in 2000, more than in previous years. (*Please note*: goat prices reported in the following pages may appear low. They are calculated from price ranges reported at auction markets. Producers have reported receiving approximately $100/head for good slaughter goats.)

In 2000, 4,000 goats were shipped to Ontario and Quebec, primarily for slaughter with a few for breeding. About 350 Manitoba breeding goats were sold to Saskatchewan and Alberta. Producers reported that the supply of good breeding stock was very tight in this period of industry expansion. Of the 442 goats exported in 2000, goats shipped to the United States were valued at almost $8,660 and shipments to Trinidad and Tobago were valued at $14,200.

An estimated 200,000 litres of goat milk was pasteurized and sold as fluid milk to retail outlets in the Prairie provinces and Northern Ontario or processed into feta and other cheeses.

Potential:

The Manitoba Goat Association and partner organizations have received funding to stimulate growth of the industry in Manitoba. The Manitoba Goat Industry Initiative will develop new educational, financial and demonstration resources. Through the initiative, goat production will be promoted as a value-added marketing option for forages. Goats are efficient converters of forage to meat and they can be used in complimentary grazing practices because of their slightly different grazing preferences. Goats will eat weeds such as leafy spurge and shrubs. Expansion of the goat meat and dairy goat industries will be promoted to new and existing producers. One operation is planning to produce a specialized pet food using goat meat. Demand for both dairy and meat goat breeding stock remains strong in domestic and international markets such as Mexico and the United States. Export markets for meat and hides, particularly in Mexico and Europe, also have potential.



GOAT SECTOR

	1997	1998[R]	1999[R]	2000[P]	2000 as a % of '99
NO. OF GOAT FARMS:	550	652	651	660	101
% of Canada					
Meat Goats	548	650	650	659	101
Commercial Milk Goats	2	2	1	1	100
GOATS ON FARMS JULY 1:					
Commercial Milk Goats	550	550	410	466	114
Total Goats	8,400	10,000	11,000	13,500	123
% of Canada				N/A	
MEAT GOAT MARKETINGS:	6,000	6,600	8,000	10,000	125
VALUE OF GOAT PROD. ($million):	0.9	1.1	1.3	1.3	100
Meat Goat (est)	0.4	0.6	1.1	1.0	91
Milk Goats (est)	0.5	0.5	0.2	0.3	150
GOAT PRICES - WINNIPEG ($/head):					
Kids	70	55	64	65	102
Nannys (Does)	58	74	73	79	108
Billys (Bucks)	93	106	109	112	103
GOAT SLAUGHTER (head):					
Inspected Slaughter in Manitoba	265	237	224	217	97
Custom Killed on Farms (est.)	3,000	3,500	4,000	6,000	150
EXPORTS OF GOATS:					
To Other countries: Number	41	18	120	442	368
Value($)	27,220	23,020	63,510	22,860	36
To Eastern Canada	2,697	3,293	4,000	4,000	100
To Western Canada	N/A	N/A	1,000	350	35
IMPORTS:					
Goats from W.Canada/U.S.	N/A	N/A	N/A	N/A	N/A

GOAT INDUSTRY CHART, 2000

ANNUAL OPERATING & CAPITAL COSTS:
($ million)

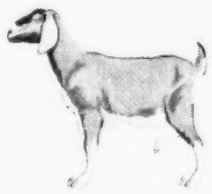
FEED:	0.24
OTHER OP:	0.34
FIXED:	0.14
LABOUR:	0.20
TOTAL:	**0.93**

MEAT GOAT FARMS: 659
MILK GOAT FARMS: 1
TOTAL GOATS ON FARMS JULY 1, 2000: 13,500

BREEDING STOCK IN:
USA: N/A
INTERPROV: N/A

BREED. STOCK OUT:
USA/OTHER: 442 HD
INTERPROV: 350 HD

MEAT GOAT IMPORTS:
USA: N/A
INTERPROV. IN: N/A



EST. PRODUCTION FROM DAIRY GOATS:
120,000 LITRES[E]
$ 0.3 MILLION[E]

MEAT GOAT EXPORTS:
USA: 0 HEAD
INTERPROVINCIAL:
EAST: 4,000 HEAD

GOATS MARKETED:
10,000 HEAD

FARM GATE SALES:
6,000 HEAD

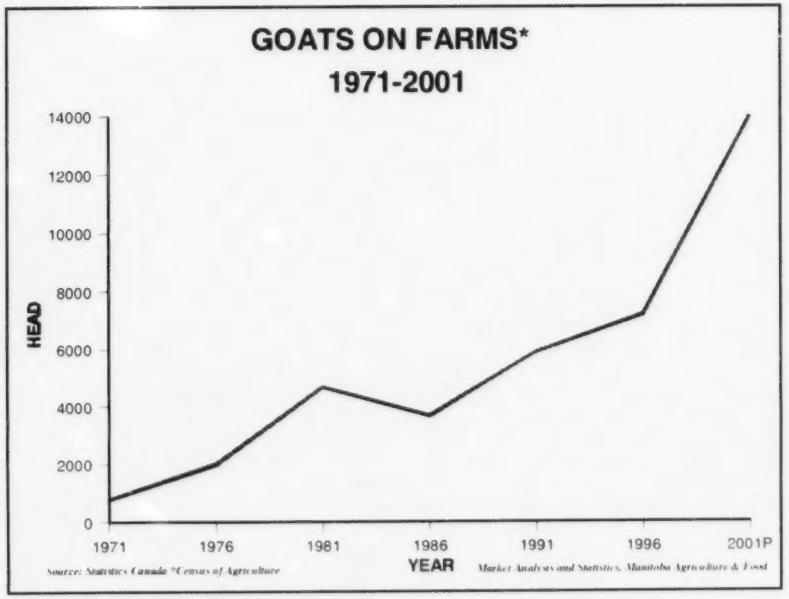
GOAT MEAT EXPORTS:
EUROPE $0
MEXICO $0

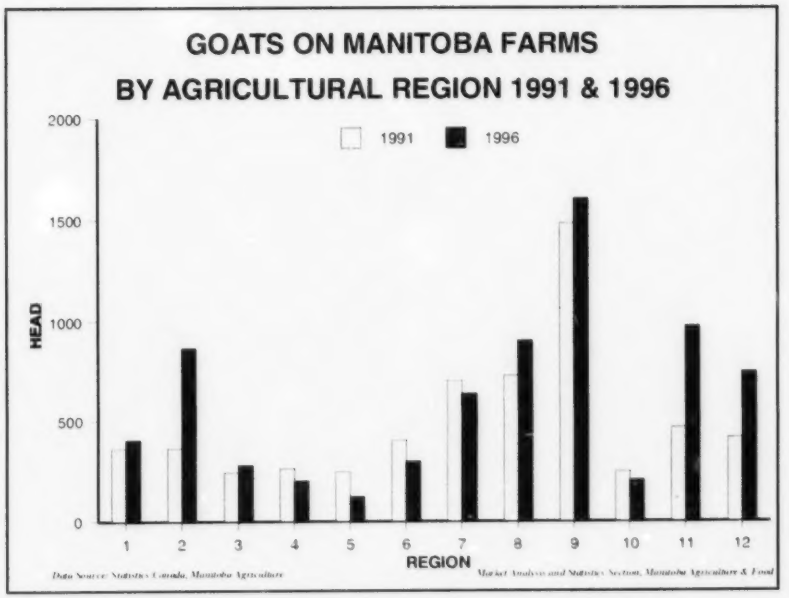
GOAT SLAUGHTER IN PROVINCIAL PLANTS:
217 HEAD

FREEZER TRADE:
100 HEAD

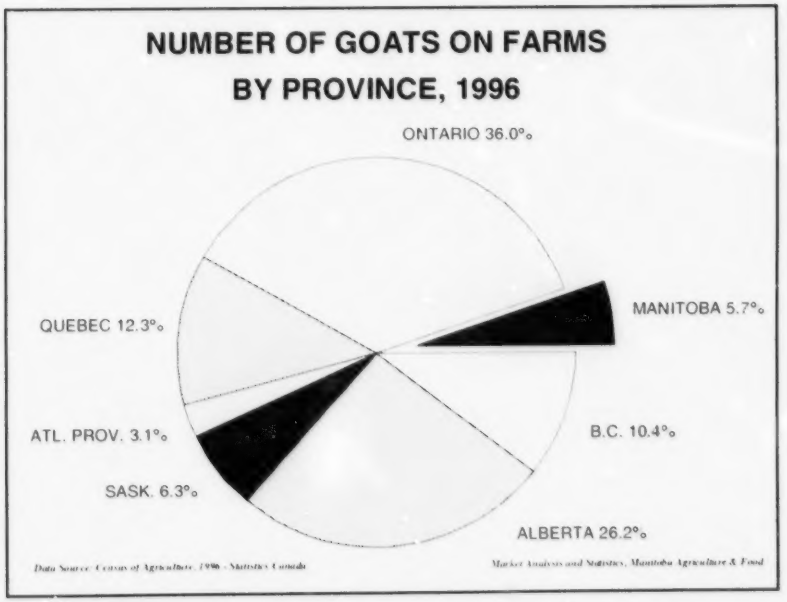
MANITOBA RETAIL AND RESTAURANT TRADE

DATA SOURCE: Manitoba Agriculture and Food, Statistics Canada, Agriculture & Agri-Food Canada, Manitoba Goat Association

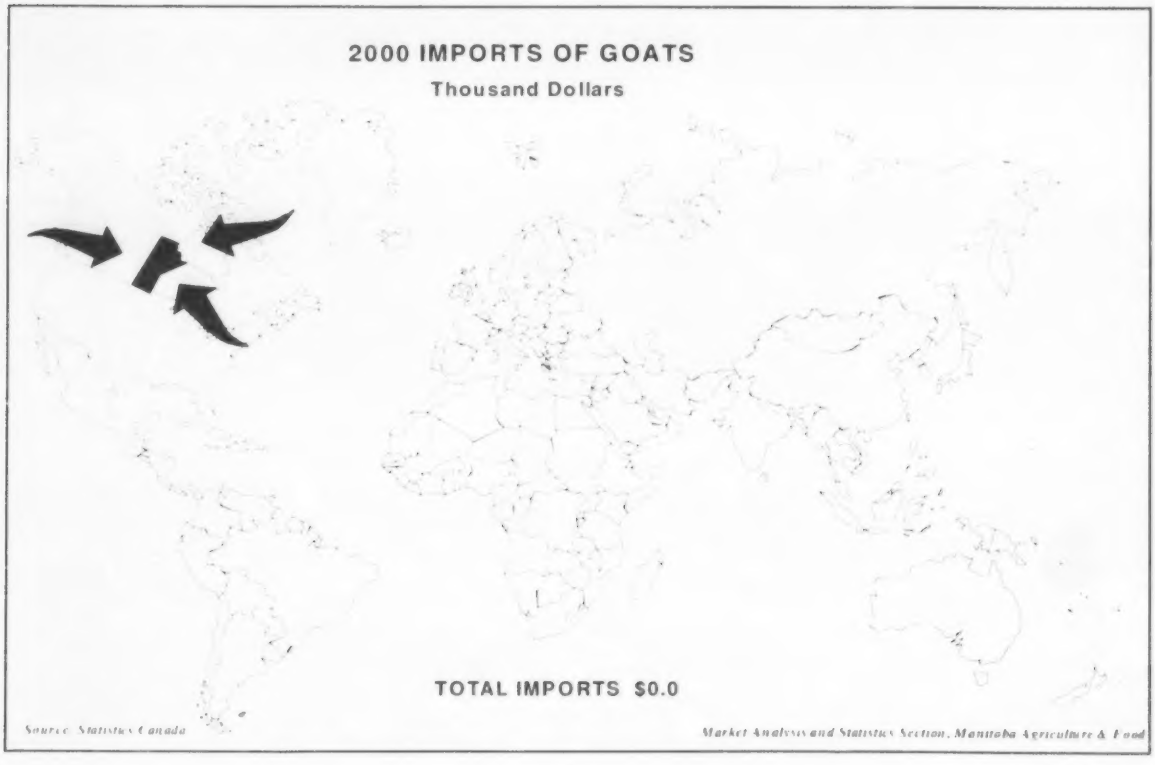

GOATS ON FARMS*
1971-2001
HEAD
14000
12000
10000
8000
6000
4000
2000
0
1971
1976
1981
1986
1991
1996
2001P
YEAR
Source: Statistics Canada *Census of Agriculture
Market Analysis and Statistics, Manitoba Agriculture & Food


GOATS ON MANITOBA FARMS
BY AGRICULTURAL REGION 1991 & 1996
1991
1996
HEAD
2000
1500
1000
500
0
1
2
3
4
5
6
7
8
9
10
11
12
REGION
Data Source: Statistics Canada, Manitoba Agriculture
Market Analysis and Statistics Section, Manitoba Agriculture & Food

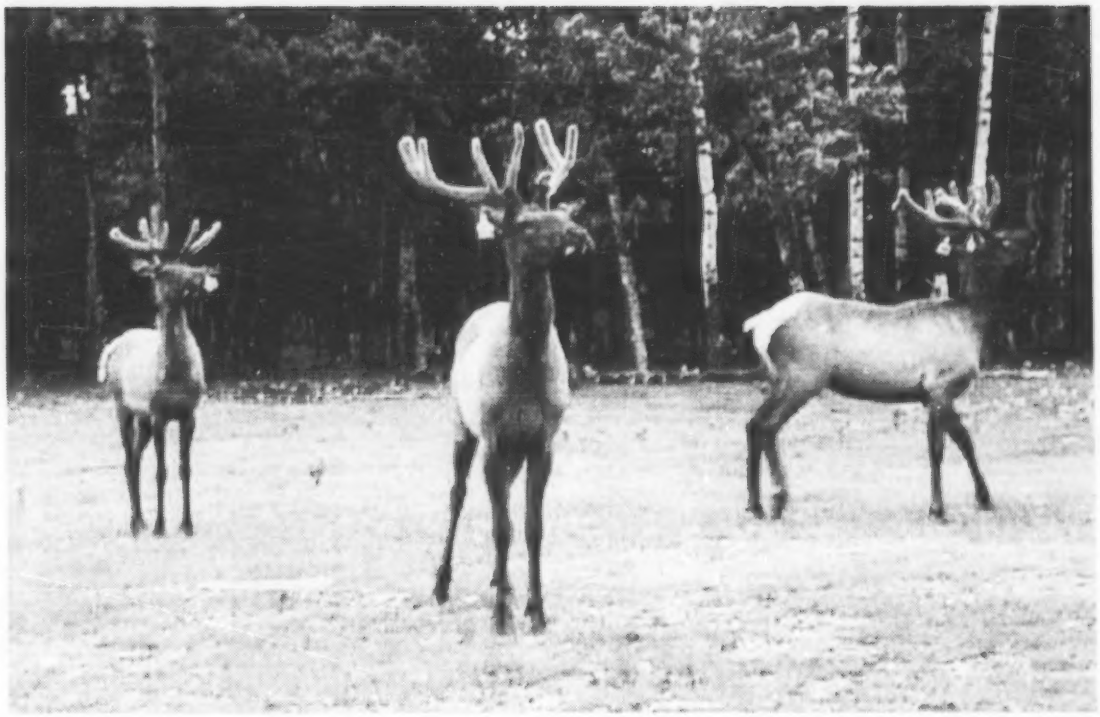
WINNIPEG GOAT PRICES BY MONTH
1996 - 2000
$ PER HEAD
160
150
140
130
120
110
100
90
80
70
60
50
40
30
20
10
0
Kids
Nannys (does)
Billys (bucks)
96F MAMJ J ASOND97F MAMJ J ASOND98F MAMJ J ASOND99F MAMJ J ASOND00F MAMJ J ASOND
MONTH
Market Analysis and Statistics, Manitoba Agriculture & Food


NUMBER OF GOATS ON FARMS
BY PROVINCE, 1996
ONTARIO 36.0%
MANITOBA 5.7%
QUEBEC 12.3%
ATL. PROV. 3.1%
B.C. 10.4%
SASK. 6.3%
ALBERTA 26.2%
Data Source: Census of Agriculture, 1996 - Statistics Canada
Market Analysis and Statistics, Manitoba Agriculture & Food

2000 EXPORTS OF GOATS
Thousand Dollars
U.S.A. $8.7
TRINIDAD AND
TOBAGO $14.2
TOTAL EXPORTS $22.9
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture & Food


2000 IMPORTS OF GOATS
Thousand Dollars
TOTAL IMPORTS $0.0
Source: Statistics Canada
Market Analysis and Statistics Section, Manitoba Agriculture & Food

CERVID SECTOR



CERVID (ELK AND OTHER DEER) SECTOR PROFILE

Production:

Velvet antler products for medicinal purposes have been imported by Asian countries from Russia since the 19th century and from New Zealand and North America since the 1970's. With the increasing demand for velvet antler and for lean, healthy red meats, elk and deer farming is becoming a popular alternative form of animal agriculture. About five million cervids (elk, red deer and other deer) are farmed around the world, most of which serve the dual purposes of meat (venison) and antler production. Commercial elk farming began in Canada in 1976, when the first permit was issued. Canada, with over 70,000 elk on 1,100 farms in 2000, has about 40 percent of the North American elk population and has become an important source of breeding stock and antler products. Manitoba began elk farming in 1993 with 90 animals. By 2000, there were 2,500 elk on 89 farms, an increase of 25 percent from 1999. The province also had 700 fallow deer, 30 white-tailed deer and 20 other deer on 7 farms in 2000.

Historically, wild elk and other deer could be found throughout the agriculture areas of North America. By nature, cervids are easily domesticated and adaptable to a great variety of farmlands and management strategies. Elk are well suited to extensive livestock agriculture. Wild elk may be herded and captured easily, and once captured, quickly adapt to their new environment. Handling elk is more challenging than handling other types of livestock as the animals are relatively large, excitable and very athletic. Properly designed and built handling facilities are essential. Elk graze grasses, legumes and other herbaceous plants, and browse the twigs, leaves and bark of woody shrubs and trees. They may be farmed in bush pastures, on highly productive intensive grazing operations, on wide-open ranches or feedlots. In winter, supplemental feeding is required, such as hay, haylage or silage, which may also include minerals, vitamins, energy and protein. Elk calve in the spring, breed in the fall. Farmed elk breed very successfully, averaging over 90 percent calving rates, and calves grow very quickly.

Markets and Trade:

The use of antler products for nutriceutical and dietary supplements in Asia has occurred for over 2000 years. Venison is a traditional and highly desired food item in European markets, and elk (wapiti) meat is a scarce and superior type of venison. Elk trophies are one of the most sought after goals for hunters with demand exceeding the supply. In response to market demands, the elk breeding stock market has been very lucrative for the past twenty years. However, prices for elk velvet antler (EVA) have fluctuated recently due to changing markets. The rise from $25/lb in 1998 to $45/lb in 2000 reflects increasing demand and ability to pay for product over that period of time. The 2000 Manitoba breakeven price is estimated to be $44/lb.

Until a few years ago, most EVA was exported as fresh frozen product from North America to South Korea or Hong Kong. That has changed and, of the estimated 155,000 lb produced in Canada and the United States in 1999, at least 45 percent was consumed in North America. Consumers are increasingly from non-Asian backgrounds, and include athletes, arthritis sufferers, and owners of performance horses and other pets. In New Zealand, deer farmers tend to respond to lower antler velvet prices by slaughtering all their poorer quality males for venison. In North America the response to the last price drop was to develop new markets.

Farm cash receipts for the Canadian elk farming and velvet antler industry in 1999 were estimated at $80 million. The value of cervid production (elk and deer marketings, inventory change plus EVA sold) in Manitoba was about $1.3 million in 2000, half the 1999 value.

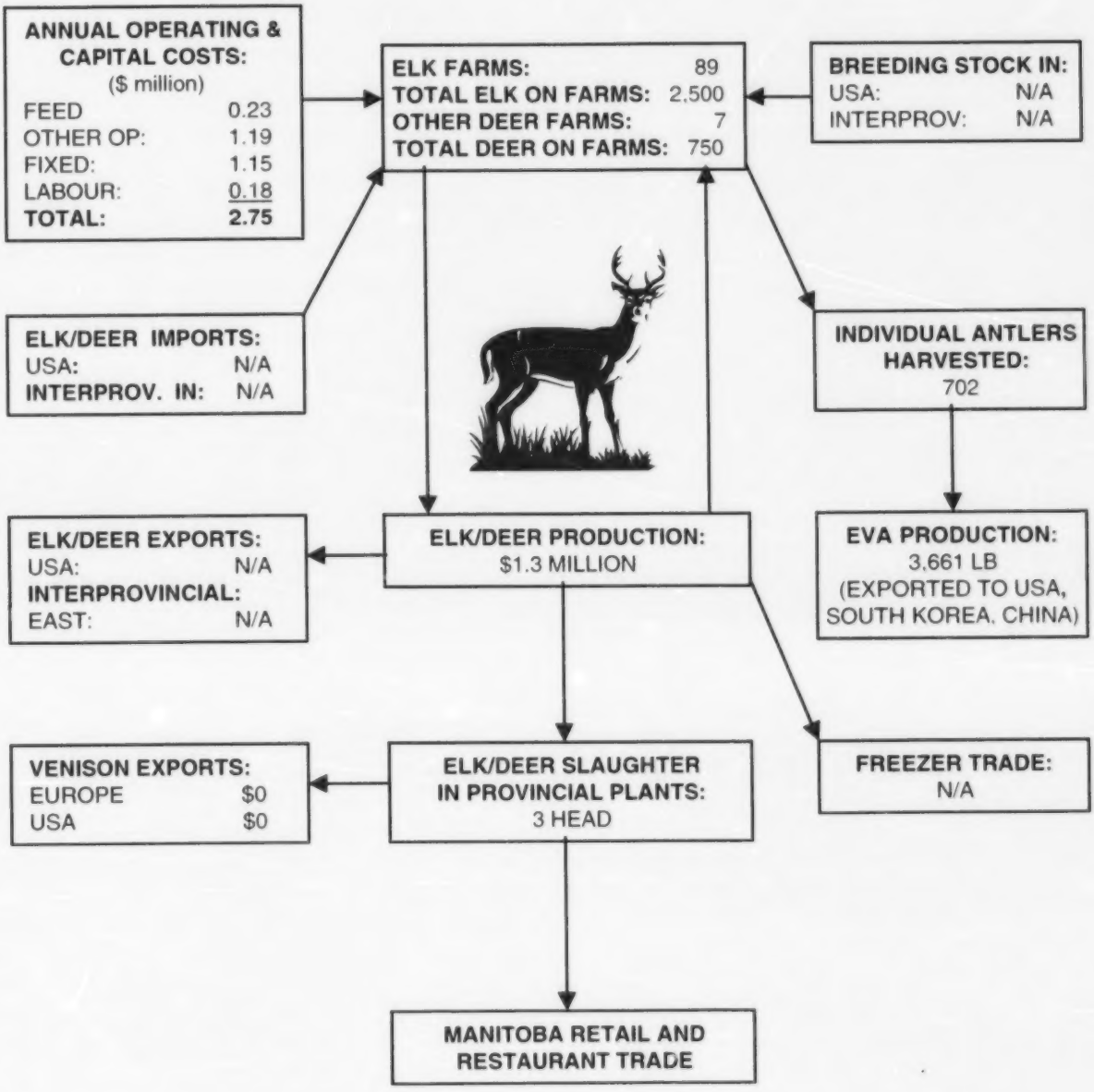
Potential:

Manitoba cervid farming has good potential as opposition to the industry has been reduced by improved management and production techniques, markets that existed long before industry development have not been satisfied and promotion and marketing campaigns will ensure that market development continues.

CERVID (ELK AND OTHER DEER) SECTOR

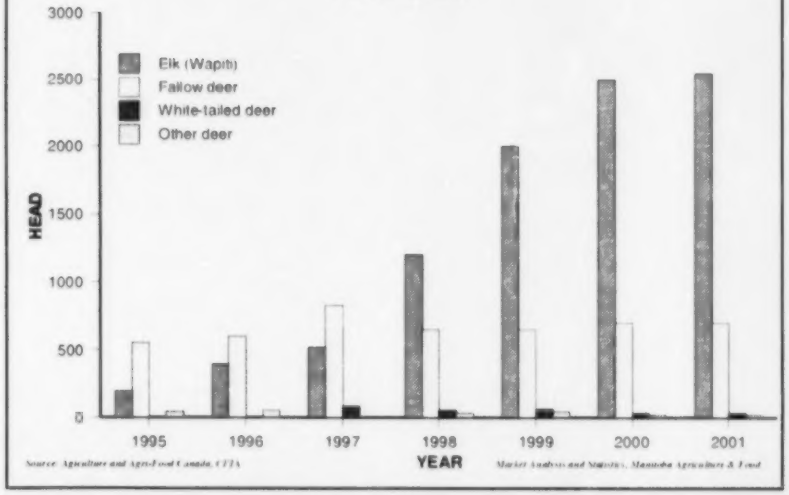
	1997	1998	1999	2000	2000 as a % of '99
NO. OF CERVID FARMS:	77	90	92	95	103
Elk	77	87	90	89	99
% of Canada		8.4	7.8	7.6	
Deer		4	4	7	175
% of Canada		0.0	0.0	0.1	
CERVIDS ON FARMS JANUARY 1:					
Elk	516	1,200	2,000	2,500	125
% of Canada	1.4	2.6	3.5	3.7	
Deer	909	730	750	750	100
% of Canada	1.7	1.8	1.5	1.5	
Fallow Deer	824	650	650	700	108
White-tailed Deer	83	50	60	30	50
Other Deer	2	30	40	20	50
VALUE OF PRODUCTION ($million):	1.6	3.5	2.6	1.3	50
Elk (est)	1.5	3.5	2.5	1.3	52
Deer (est)	0.1	0.0	0.1	0.0	34
AVERAGE CANADIAN PRICES:					
Elk ($/head):					
Bred Cow	21,730	13,445	6,175	4,130	67
Bull	19,600	5,550	1,570	2,900	185
Heifer Calf	17,040	7,250	4,190	2,670	64
Bull Calf	3,810	3,345	1,930	1,780	92
White-tailed Deer ($/head):					
Bred Doe	8,000	12,000	5,600	3,325	59
Yearling Doe	8,000	9,000	6,325	4,395	69
Yearling Buck	2,000	2,250	3,420	2,150	63
Doe Fawn	4,500	5,400	3,205	1,910	60
Buck Fawn	850		1,670	1,420	85
Antler Velvet (frozen, FOB farm) ($/lb)	90	25	32	45	141
INSP. MANITOBA SLAUGHTER (head):					
Elk	0	6	0	0	100
Deer	76	166	162	3	2
INDIVIDUAL ANTLERS HARVESTED:		569	593	702	118
Velvet antler (green) produced (lb)		1,425	2,874	3,661	127
EXPORTS OF CERVIDS:					
To Other Countries: Number	15	22	17	0	0

ELK AND OTHER DEER INDUSTRY CHART, 2000



DATA SOURCE: Manitoba Agriculture and Food, CFIA, Agriculture & Agri-Food, Ian Thorleifson

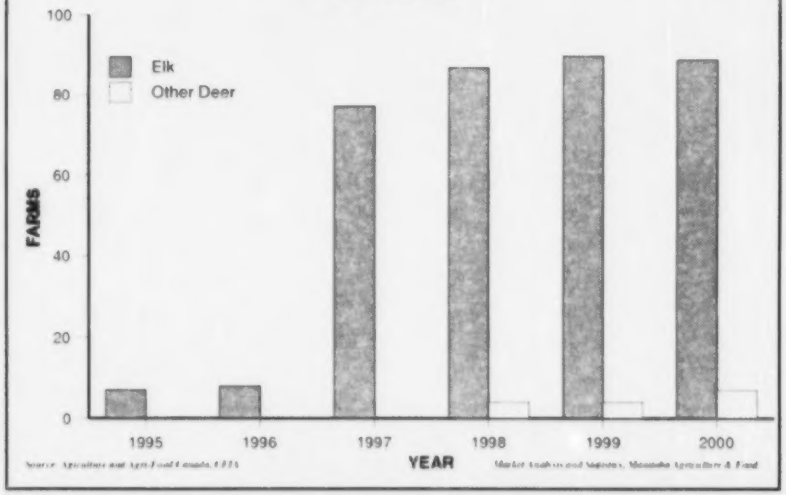
ELK AND OTHER DEER ON FARMS
1995-2001



Source: Agriculture and Agri-Food Canada, CFIA

Market Analysis and Statistics, Manitoba Agriculture & Food

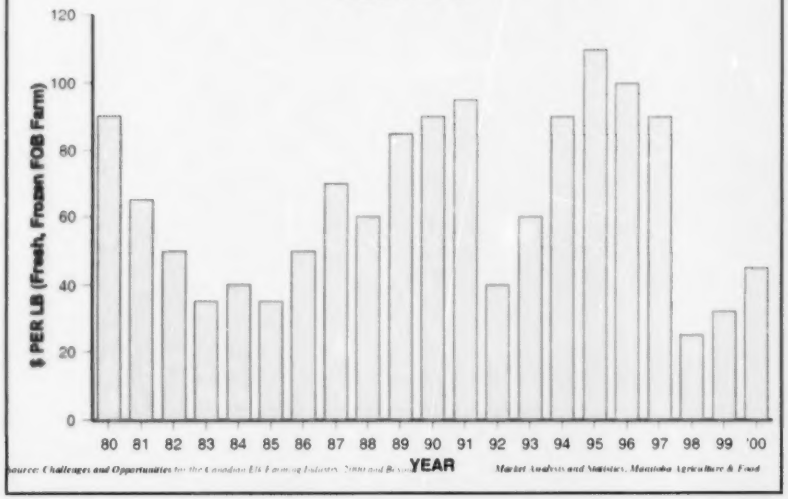
NUMBER OF DEER (CERVID) FARMS
1995-2000



Source: Agriculture and Agri-Food Canada, CFIA

Market Analysis and Statistics, Manitoba Agriculture & Food

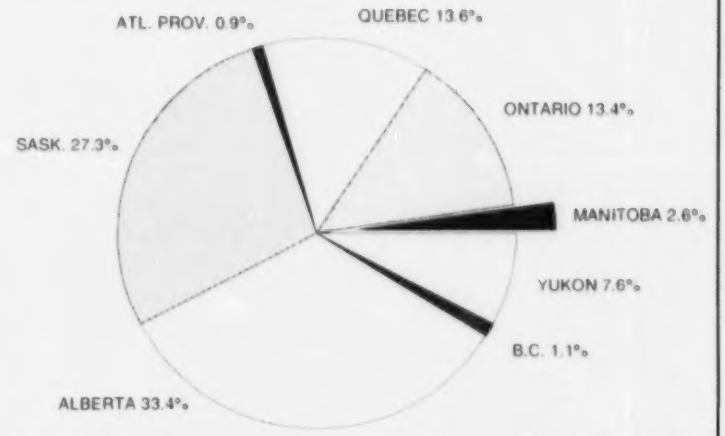
ELK AND RED DEER VELVET ANTLER PRICES
1980-2000



Source: Challenges and Opportunities for the Canadian Elk Farming Industry, 2000 and Beyond

Market Analysis and Statistics, Manitoba Agriculture & Food

NUMBER OF ELK AND OTHER DEER ON FARMS
BY PROVINCE, 2000



Data Source: CFIA, Agriculture and Agri-Food Canada

Market Analysis and Statistics, Manitoba Agriculture & Food